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ABSTRACT

This curriculum guide was developed to be used as a resource guide to assist marketing and distributive education teachers in planning and teaching a course in fashion merchandising. First, an introductory section is devoted to the management of the fashion merchandising curriculum, including information on the guide's background, units of instruction, competencies, format, instructional planning, instructional delivery, evaluation and feedback. Next, the guide presents the following teaching units: (1) Overview of the Fashion Industry; (2) Communications in Marketing; (3) Merchandise Information for Fashion Merchandising; (4) Personal Selling; (5) Merchandising Operations; (6) Sales Promotion; and (7) Employment Skills. Each unit includes a broad course outline, which provides competencies and objectives sequenced by topic; a detailed content outline, which includes printed references, suggested student activities, handouts, and transparency masters; and evaluation measures and keys. (LAL)

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# Fashion Merchandising

MARKETING & DISTRIBUTIVE
EDUCATION
COMMITTED TO THE IMPROVEMENT
OF MARKETING

JC 860583

Marketing and Distributive Education
Division of Vocational Education
North Carolina Department of Public Instruction

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# FOREWORD

The fashion merchandising and management field offers a variety of occupational opportunities for the trained professional. The trends of the industry are forever changing as consumers' demands change. To be an up-to-date, skillful employee, employer or entrepreneur in this growing area of marketing, requires the sound development of the basic skills of communications, mathematics and human relations as well as the development of the technical skills of management, merchandising, operations, promotion, and salesmanship. Product and service knowledge is a must for any professional merchandiser in this rapidly growing/changing field.

This resource guide has been developed to assist marketing and distributive education teachers in their planning, preparation and implementation of instruction designed to develop these required competencies. The format is so designed to encourage the teacher's creativity in its use and expansion.

A Craig Phillips
A. Craig Phillips
State Superintendent
North Carolina Department
of Public Instruction

Clifton B. Belcher
Clifton B. Belcher
Director
Division of Vocational Education

ACKNOWLEDGEMENTS

The content, format, and preparation of this competency-test item bank and these units of instruction reflect many long hours of work and dedication on the part of a number of marketing and distributive education professionals. The consultant staff expresses their appreciation to all individuals involved in this project.

We express appreciation to all teachers, teacher-educators, and business people who assisted in the identification, verification and validation processes for the listed competencies. These competencies were derived from three validated studies:

(1) A Competency Pattern Approach to Curriculum Construction in Distributive Education, 1967, Dr. Lucy Crawford (a study funded through the U. S. Office of Education);

(2) A Theoretical Framework for Instructional Programs in Distributive Education, 1977, Dr. Richard Lynch (a study funded through the U. S. Office of Education); and,

(3) Validated Competencies for Competition: Apparel & Accessories, Master Employee, 1981, Distributive Education Clubs of America.

We are especially grateful to those marketing and distributive education teachers who served on the writing team for Fashion Merchandising 7271 and Fashion Merchandising and Management 7272:

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Mrs. Betty Standish, Director of Vocational Education, Charlotte/Mecklenburg Schools

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# Managing the Fashion Merchandising Curriculum

## Background

This Fashion Merchandising Curriculum Guide was developed to be used as a resource guide in planning and teaching Fashion Merchandising 7271.

Through a lot of involvement of fashion merchandising instructors over a two-year period, a curriculum review team organized the competencies in appropriate scope and sequence for Fashion Merchandising and for the second-year course, Fashion Merchandising and Management.

## Units of Instruction

The competencies were unitized for Fashion Merchandising into seven teaching units. These units and the recommended instructional period for each are listed below:

Fashion Merchandising

| Unit | Approximate Teaching Time |
|---|---|
| Overview of the Fashion Industry | 3 weeks |
| Communications in Marketing | 3 weeks |
| Merchandise Information for Fashion Merchandising | 5 weeks |
| Personal Selling | 9 weeks |
| Merchandising Operations | 7 weeks |
| Sales Promotion | 3 weeks |
| Employment Skills | 3 weeks |

Thirty-three weeks were suggested as the total instruction time allocated. This allows three school weeks for program orientation, exams, DECA activities and interruptions that normally occur.

The competencies were sequenced so that a student could exit from Fashion Merchandising into other appropriate, second-level marketing and distributive education courses, such as Marketing and Merchandising, with a base of core competencies which would allow him/her to successfully prepare for his/her career goal.

## Competencies

The competencies were validated by teachers and fashion merchandising employers and employees. Each competency is designated as either core, supplemental or content only. This designation should be interpreted according to the following definitions:

1. CORE COMPETENCY - Minimal expectations for student achievement in a given course and/or course sequence. THE MUST KNOW'S.

2. SUPPLEMENTAL COMPETENCY - Optional outcomes believed to be important to student development for a given course and/or course sequence. THE NICE TO KNOW'S.

3. CONTENT ONLY - A competency identified by the curriculum review team as important to the curriculum writer in his or her development of the actual unit of instruction. This will ensure inclusion of the concept.

At the beginning of each unit, each competency is identified as either core (by the capital letter "C"), supplemental (by a "S"), or content only (by the letters "CO").

In the guide, the competencies are sequenced according to the writers' recommendations as to the best teaching sequence. The writing team realizes that some teachers may prefer to teach units in another order (i.e. the Merchandising Operations Unit before the Merchandise Information and Personal Selling Units).

The comprehensive competency listing for the course may be utilized as a basis for a training plan or may serve as a student skill-record for documenting student competence.

## Format

The format for each unit within this guide is as follows:

| | |
|---|---|
| Sections I and II | -- Broad Content and Detailed Content Outlines |
| Section III | -- Student Activities |
| Section IV | -- Evaluation Measures and Keys (Competency Test Item Bank) |
| Section V | -- Printed References |

These sections can be best described as follows:

. Broad Content Outline

The broad content outline shows the competencies and objectives as sequenced by topic. Each competency is identified as core, supplemental, or content only. This section should be very helpful in developing your course syllabus and annual teaching calendar.

. Detailed Content Outline

The detailed content is designed to help you as the instructional manager plan for student activities. You may use the suggested content and activities or should feel free to develop your own activities to ensure student competence.

Within the Detailed Content Outline:

. "Printed references" (symbolized by the letters "PR") are noted to help you locate instructional resources for student use.

. "Student activities" (symbolized by the letters "SA") are noted and have been developed to give you a variety of ideas for developing methods for helping students achieve the competencies. These activities appear in a separate section. Some student activities which are simple to explain are listed in the front of the Student Activities Section (SA 1, SA 2, etc.). Those that you may desire to reproduce for student use and the writer felt were essential are printed in such a manner as to facilitate reproduction. Audio visuals are suggested which may be purchased commercially to enhance student learning.

- "Handouts" (symbolized by the letters "HO") for providing students information were developed and noted; however, because of printing limitations, they have been omitted at this time.

- "Transparency masters" (symbolized by the letters "TM") are noted but have likewise been omitted at this time.

It is hoped that the "Handouts" and "Transparency Masters" that have been developed can be added at a later time as additional instructional assistance for you.

The Detailed Content Outline is in a format which will allow you to include your own planning notes along the right side of each sheet. As you locate resources, you may write them in and include the materials in the appropriate section for future use.

Evaluation measures and keys are included for the competency/test-item bank for this course. A table of specifications for test construction is included for your use in test planning. The evaluation measures in this CTIB will be further developed as competency-based competitive events are returned to you from the apparel and accessories instructional area. You should reference these appropriately in your planning notes and include them in your bank of evaluation measures. The test keys are printed on separate pages so that you can easily reproduce test items for use in your evaluation without any changes.

"Printed references" are shown in one location for each unit for your convenience in purchasing and ordering materials. This section should aid you in your unit planning.

## Instructional Planning

This guide is designed to help you develop:

- an annual course syllabus;
- teaching unit plans; and,
- a competency testing program.

As with any vocational subject, planning must be done in conjunction with the business users (employers) of our products. A Fashion Merchandising Advisory Committee or a subcommittee of the Marketing and Distributive Education Advisory Committee should review the course syllabus annually. These business people should be involved in planning experiences which help students achieve and demonstrate competence.

## Instructional Delivery

The 1982 edition of the Vocational Education Program of Studies allows students in Fashion Merchandising to be trained through the use of a variety of instructional methods. Students may be trained in a regular classroom/

laboratory situation where a variety of simulated activities can be utilized in developing the core competencies. The common store theme of "Logans" in each unit allows for a simulated business to encompass the entire course. Students can be given the greatest amount of realistic training by being placed in actual on-the-job training stations. If the on-the-job training meets the standards set forth in the Vocational Education Cooperative Policies and Standards, then an additional unit of credit should be awarded. When a major internship or business/DECA project is utilized to enhance and expand the classroom/laboratory training, the local school system must establish a policy which allows for awarding appropriate credit which is commensurate with the time and project work requirements.

## Evaluating Student Achievement

The evaluation measures included in this guide provide one method of evaluating student competence. On-the-job training supervisors, DECA project advisory committee members, and internship supervisors should also be a part of the evaluation process. The ultimate evaluation is the success rate of students and the satisfaction of employers with the students who are trained in Fashion Merchandising.

Employment opportunities exist in fashion merchandising for a range of students that include disadvantaged and handicapped students as well as gifted and talented students. The fashion merchandising instruction and evaluation should be individualized to allow for the successful training and placement of all students. Because of the variety of levels of job entry opportunities in fashion merchandising, a wide range of students and businesses can be accommodated with the fashion merchandising competencies.

## Feedback

As you implement this fashion merchandising curriculum, your feedback to the North Carolina Marketing and Distributive Education Staff is valuable in helping us to improve later curriculum products, provide needed staff development to teachers and provide technical assistance to LEAs beginning new programs. Your contact with employers of fashion merchandising students and former students helps us know what adjustments should be made as fashion merchandising continues to evolve.

# FASHION MERCHANDISING

## HANDOUTS AND TRANSPARENCIES

Many of you have indicated a need for the handouts and transparencies that are referenced in your Fashion Merchandising guide. After looking at these materials we have found that you already have many of these items in your IDECC LAPs. Since we do not have an artist available and our printing budget is limited, there are some commercially prepared materials that are far better than any we could print. Therefore, we are suggesting you obtain these materials for your use.

Two references that we feel are basic are: Retail Sales Transactions by Susan Eisenberg and Color In Display by Judith L. Domian and Kent Duniphan. These may be purchased from Milliken Publishing Company, St. Louis, Mo. or you may find a school supply store that carries these books. Each book contains transparencies, duplicating masters and a teacher's guide.

In some instances we are suggesting you have students do collages or bulletin boards to replace some handouts and transparencies.

We are working to provide you unit by unit either printed materials, references, or alternatives. When you receive these materials you should put them in your guide in the appropriate places.

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# OVERVIEW OF THE FASHION INDUSTRY

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| COMPETENCY STATEMENT | 7271 | C | S | CO |
|---|---|---|---|---|
| I. Terminology | | | | |
| 001 Demonstrate knowledge of fashion industry terminology.<br>Given a list of key fashion terms, the student will define each.<br>The student will demonstrate proper usage of fashion terminology. | X | X | | |
| II. History (1900's) | | | | |
| 002 Demonstrate knowledge of fashion history and how it relates to today's fashion.<br>The student will identify fashions from various periods of time and state their historical significance. | X | | X | |
| III. Fashion Principles | | | | |
| A. Fashion Cycle | | | | |
| 003 Demonstrate knowledge of the fashion industry's cycles of merchandise acceptance.<br>The student will identify each of the fashion cycle steps and state its importance.<br>Given a skeleton fashion cycle, the student will label the five (5) steps which occur in merchandise acceptance and identify the price level for each step. | X | X | | |
| B. Society's Influence on Today's Fashion | | | | |
| C. Fashions' Influence on Society | | | | |
| 004 Demonstrate knowledge of the geographic movement of fashion.<br>The student will identify those factors which determine how society is influenced by fashion. | X | | | X |
| IV. Fashion Media | | | | |
| 005 Read current fashion and trade magazines and newspapers to keep informed of current trends.<br>The student will identify at least six leading fashion periodicals and determine if each is a trade or consumer publication.<br>Given a list of periodicals, the student will identify the consumer market to which each is aimed. | X | X | | |
| V. Trends | | | | |
| 006 Adjust and adapt to new and unique ideas and situations.<br>The student will define the term fashion trends and identify factors which contribute to new and different fashion trends. | X | | X | |
| 007 Identify incoming fashion trends.<br>The student will identify those factors that influence fashion trends.<br>The student will illustrate and discuss incoming fashion trends using current periodicals for illustrations and facts concerning the trends. | X | X | | |

Marketing and Distributive Education

Fashion Merchandising - 7271
Fashion Merchandising and Management - 7272

| COMPETENCY STATEMENT | 7271 | C | S | CO |
|---|---|---|---|---|
| VI. Designers | | | | |
| 008 Demonstrate knowledge of the leading fashion designers, characteristic features of their fashions, trends they are currently setting, etc.<br>Given a list of leading fashion designers, the student will identify the characteristic features of their designs.<br>The student will identify the influence designers have on the fashion industry. | X | | X | |
| 009 Identify ways fashion designers influence the sale of apparel and accessory merchandise.<br>Given a list of leading fashion designers, the student will match the given trademarks with the appropriate designer. | X | | | X |
| VII. Types of Store Organization | | | | |
| VIII. Career Opportunities | | | | |

PLANNING NOTES

## I. Terminology

### A. Understanding Fashion

(PR-3; p. 5)
(PR-4; pp. 3-8, pp. 14-18)
(PR-7; pp. 2-8)

Fashion: styles which are currently accepted and used by a particular group of people at a given time.

1. **Basic or classic fashion**
   a. Is accepted by the majority of people.
   b. May be expensive or inexpensive.
   c. Pleases the average customer from the retailer's viewpoint.
   d. Remains "in fashion" for long time.
2. Staple or mass fashion
   a. Creates keenest retailing competition.
   b. Is manufactured and sold in large quantities at moderate to low prices.
3. High fashion (Haute Couture)
   a. Has limited appeal because of newness, unusualness, and often impractical.
   b. Is risky but often profitable when aimed at right customer group.
   c. Is usually produced and sold in small quantities at high prices.
   d. Is accepted by those who are first to accept fashion change and usually the elite among consumers.
4. Fad fashion
   a. Is short-lived fashions.
   b. Is enthusiastically accepted by a large group for a very short period of time.
   c. Affects a narrow group within total population.

### B. Understanding Merchandising

Merchandising: the planning, buying, and selling of merchandise in order for a profit to be realized.

1. Planning
   a. Estimating how much is expected to sell.
   b. Estimating the right amount of inventory to meet the expected rate of sale.
2. Buying
   a. Using the planning process as a basis for purchasing stock.
   b. Purchasing up to the dollar figure which has been approved by the merchandise manager.
3. Selling
   a. Communicating with consumers in order to sell and promote image of store.
   b. Promoting merchandise through advertising, displays, and other activities to create interest and response from consumer and to influence purchase of merchandise.

### C. Understanding Fashion Merchandising

Fashion Merchandising: refers to the planning, buying, and selling of wanted fashion oriented merchandise at the right time, place, quantity, and price.

(HO-1)
(SA-1)

[CTIB 001-00-11]
[CTIB 001-00-12]
[CTIB 001-00-13]

## II. History (1900's)

### A. Fashions mirror periods of time

(PR-7; pp. 12-15)
(SA-2)

In the 20's the sexual emancipation was expressed in the flappers short skirts and short hair which created more masculine appearances. The 80's truly reflect the "free" lifestyles with casual dress in jeans and less complicated fashion styles.

1. Reflects the way we think and live.
2. Reflects the values of various levels of society.

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PLANNING NOTES

3. Reflects the degree of class structure.
4. Reflects the activities of the population.

B. Fashions are evolutionary, seldom revolutionary (TM-1)

Consumers decide when styles no longer appeal and when styles will exist. Consumers gradually accept new hem lengths or new lapel widths. Designers must keep current fashions in mind since most consumers buy apparel and accessories to supplement and update their present wardrobe.

C. Fashions end in excess

Hoopskirts ballooned out so large they made moving from room to room complicated. Miniskirts became so short they caused many problems. When the extreme is reached, people begin to seek new and different fashions.

D. Fashions are descriptive of the decades (PR-10)

1. Events of the 1900-1909 period. (SA-3; PR-6)
   - a. Paris was the center of the fashion world. (SA-4)
   - b. The period was called the "beautiful period."
   - c. In England, the period was known as the "Edwardian Era."
   - d. The first ready-to-wear fashions were mass produced.
   - e. Clothing was worn for adornment.

     Clothing was not functional, comfortable, or economical. High hairdos were topped by large brimmed hats lavishly trimmed. Women wore corsets. Masculine clothing consisted of standardized cuts. Colors were sober and styles basic. Pants had cuffs and creases. Waistcoats were worn to match coat and trousers.
   - f. Swimwear indicated changing standards of modesty.
   - g. The "Gibson Girl" and "Gibson Man" were evident.

     Women were becoming more active and vocal. The young "New Women" wanted to resemble the Gibson Girl with the shirtwaist outfit with its stock and sailor hat. The young man, the Gibson Man, was clean-cut, square jawed, and smooth shaven.

2. Events of the 1910-1919 period.
   - a. Paul Poiret introduced the "hobble" dress.

     This was a high-waisted skirt closely fitted to the hips with the foot of the skirt caught in a straight band. This styling helped to bring about the disappearance of the corset.
   - b. War closed most fashion houses.

     Women had to take care of their own fashions. They were looking for more comfort and convenience. More women working outside the home led to a shortening of skirts, more adoption of silk hosiery versus the previous cotton hosiery, and low-cut shoes rather than high boots.

3. Events of the 1920-1929 period.
   - a. The decade was known as the "Roaring 20's."

     Women were influenced by movie screen beauties. Emancipation was evidenced by the "boyish" look, and shirts reached their high point in lengths that came only to the knee. The dress was the "chemise" (no waist, no bosom) and hair was "bobbed" under the tight, skull shaped felt hat called the cloche. Young women who followed this fashion trend were called "Flappers." The 60's were rather reminiscent of this period with the miniskirt.
   - b. Masculine fashions saw little change.

     "Union suits" were still being worn, wool for winter and cotton for warm weather.
   - c. Cosmetics were coming into great importance.

4. Events of the 1930-1939 period.
   - a. Hemlines lengthened, fashions became functional.
   - b. "Classics" were fashionable.

     With the depression, consumers became thrifty. They purchased Shetland sweaters, tweeds, and the "Shirtmaker Dress."

c. Royal honeymoon had influence.

England's King married a divorcee and renounced his throne. Their honeymoon to Tyrol brought the influence of the dirndl to fashion. In the 80's Prince Phillip married and the influence of Lady Diana's hairstyle became evident.

d. In 1938, Vogue ran the first issue and was devoted exclusively to American designs.
e. Elasticized yarn allowed production of the one-piece maillot.
f. Men's fashions were coordinated, but not necessarily with matching pants and coats.

5. Events of the 1940-1949 period.

a. War had great influence.

Law 1-85 restricted yardage in clothing and the shirtwaist dress became a basic working girl's dress, along with the factory girl's overalls. Fashions had wide, padded shoulders, high necklines, wide lapels, collars, scarves, and bows.

b. The "New Look" was introduced.

Christian Dior introduced the look with feminine curves, tiny waist and great fullness in longer skirts.

c. Shoe fashions were of importance.

The Capezio ballet slipper and the Norwegian moccasin were two very important shoe fashions. Wedge pumps and platforms were forerunners for the shoes of the 70's.

d. The two-piece swimsuit prepared the way for the French bikini of 1947.

6. Events of the 1950-1959 period.

a. American designers received much acclaim.
b. "Baby Doll" look appeared with volumns of crinoline petticoats.

This was a fashion feature no longer practical in a fast-paced society and quickly gave way to the "sack" or "chemise" dress.

c. Sportswear influenced every category of fashion late in the decade.
d. Masculine apparel showed narrow lapels, ties, and belts.
e. Pleats disappeared from slacks and gave way to a smoother appearance.

This was a time of sweater vests, argyle socks and corduroy fashions for an "Ivy-League" look (much like the "Preppy" look of the 80's).

f. The "Costume" dress made the biggest news in late 50's.

This was a simple straight dress with its own jacket.

7. Events of the 1960-1969 period.

a. The "Jackie" Look was readily accepted.

This consisted of a simpler dress worn by First Lady, Mrs. John F. Kennedy and was a loose, sleeveless, high-necked overblouse and slim skirt.

b. The shirtwaist dress remained a recurring fashion.
c. Hemlines continued to rise, hair continued to grow.

This was an era of youth. The "sack" (chemise, or also known as the shift) gained more acceptance.

d. Furs were dominant theme in winter fashions.

Furs ranged from fun furs, fake furs, real furs, short-haired, long-haired, plain or patterned.

e. The chemical industry made miracles.

(1) Drip-dry fabrics introduced.
(2) Vinyl invaded sportswear, shoes, and the home.

f. Men competed for fashion attention.

Both sexes patronized boutiques and discotheques as males grew their long hair and beards, wore turtleneck sweaters, chains, tight pants, Edwardian suits and Nehru collars.

8. Events of the 1970-1979 period.

a. Women rejected the midi skirt.

Women became unsure and confused about hemlines and for the first time, the majority of the female population wore pants on the street as a substitute for dresses and skirts.

b. Swimwear became more and more brief.

The string suit was even more brief than the bikini.

c. The wrap-skirt and T-shirt dress were typical of simplicity.

More of society thought of clothes as disposable and bought cheaply in order to have a new fad or fashion each season. There was less class distinction in society as the rich and less rich dressed in similar fashions. Blue jeans dominated the later portion of the decade as more people rejected those fashions which were restrictive of the fast-paced society. Women did not want to wear corsets and some did not want to wear bras. All of this made demands for slimmer figures and more emphasis on the diet and exercise.

d. Black society established their unique claims to beauty.

Minority groups no longer worried about their curly hair or slanted eyes and the color of their skin.

e. Men continued to be fashion conscious.

Probably the most dramatic changes in masculine costume came during this decade. Leisure suits dominated and colors went from drab to interesting tones for the male. The wing tip shoe, white shirt and tie, and navy blue suit were a thing of the past. "He" was coming into his own in the fashion world. Casual living gave him blue jeans and T-shirts, sport coats and slacks.

9. Events of the 1980's.

The 80's are a continuation of the 70's with their jeans and casual living. But there is also a trend to return to the classics of the "Ivy-League" look, which in the 80's is referred to as the "Preppy" look. The economy dictates a return to investment clothing, gold jewelry, and a watchful eye for those fashions which are practical, functional, and carrying a "designer" label.

[CTIB 002-00-11]
[CTIB 002-00-12]
[CTIB 002-00-13]

III. Fashion Principles

A. Fashion Cycle

1. What is a fashion cycle?

(PR-7; pp. 34-42)

It is the life curve of a style as it is born, reaches popularity, and then dies.

a. Stages of a fashion cycle.

(TM-2)

(1) Introduction of new fashion.

A producer seeks to offer consumers a new style, color, or texture. Those who seek to have something "new and different" are willing to pay a big price to be outstanding or to be the first to have a new product or item. Since most new designs are produced in small quantities, production costs and risks are high. Due to these factors, the new fashion or design is introduced in higher-priced merchandise.

(2) Rise in popularity of new fashion.

If a new design seems to be of the type that will "catch on", manufacturers will copy the design in such a way that it might be mass produced at a lower price. Designers who work for various manufacturers read current fashion news and many times attend shows of original designers both here and abroad in order to keep abreast of new developments. The customer who likes to be different and yet cannot afford the price of an original will be induced to buy the adapted style at the reduced price and will have the further prestige of people thinking that perhaps their fashion is an original.

(3) Mass sales of new fashion.

After the fashion has been successfully popularized and a market created for the item, other manufacturers will adapt the style in order to make a little profit also. Many manufacturing firms will be involved at this stage and the style will have been at its peak in public sales acceptance.

(4) Decline in popularity of new fashion.

The smart merchant immediately reduces the entire stock of an item when the first indication is made in the market that the style is going to be replaced by something else. At this stage, racks of merchandise are reduced in price in the retail store. The slope of the introduction stage is rather slow and gentle, but the decline stage is rather steep and sudden.

(5) Obsolescence and abandonment.

Manufacturers completely discontinue making the style and those retailers who have not sold all of their stock have reduced the price drastically. Many times it is necessary for retailers to mark items at half-price or even less.

b. Long run and short run fashion cycles.

(1) Long run cycle.

(a) Fashions that are wearable, becoming, and familiar - rise to a peak of quick popularity and are slow to decline.
(b) Fashions that are wearable, becoming, and unfamiliar - rise to a slow peak as they require a familiarization period before acceptance.
(c) Basic or classic and staple fashions are representative of long run cycle.

(2) Short run cycle.

(a) Fashions have a fast acceptance and fast decline.
(b) Fads are representative of short run cycle.

2. What is the importance of fashion cycles?

a. To aid buyers in stocking merchandise.
b. To aid buyers in timing effective disposal of merchandise.

[CTIB 003-00-11]
[CTIB 003-00-12]
[CTIB 003-00-13]

B. Society's Influence on Today's Fashions

(PR-7; pp. 39-41, 70)

1. Historical influences.

(SA-5)

a. Emancipation and improved status of women.
b. Higher levels of education.
c. Development of suburbia.
d. Increased leisure.
e. Growth of middle class population.
f. Increased availability of high fashion at moderate prices.
g. Increase in buying power.

2. Sociological influences.

a. Decrease in upper class influence.
b. Growing influence of middle class.
c. Growing influence of youth dominated population.
d. Fashion tastes becoming international.
e. Increase in sales promotion and communications.

C. Fashion's Influence on Society

(SA-6)

1. Psychological factors.

Fashions have developed fashion consciousness and created desires for sexual attractiveness, comfort, variety, leadership, social approval, distinction, and self-improvement. Indications of this are found in growing popularity of "designer label" merchandise and the popularity of sex-oriented advertising directed toward the blue jean market.

2. Economic factors.

(PR-7; pp. 124-133)

a. Geographic markets.

Regional fashion apparel markets have become a necessity as more and more consumers demand that the latest fashions be available to them more quickly. Television informs viewers of the latest trends, making society the most sophisticated consumers in history. With travel costs soaring, more demand will be placed on the regional markets. Although New York is still the major fashion apparel market, regional marts are changing the pattern of wholesale fashion merchandising.

The major regional fashion apparel markets are the Dallas Market, the California Apparel Mart, the San Francisco Apparel Mart, the Denver Market, the Carolina, Virginia, and Tennessee Market, the Atlanta Market, the Miami Market, and the Chicago Mart.

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b. Competition.

Consumer response to fashion change results in adjustments in the industry - from the designer's conception to promotion, to the availability, to the consumer acceptance. Risk is a part of every stage of development, and timing is an important factor in the acceptance or failure of a fashion idea.

3. Theories of fashion influence. (PR-7; pp. 58-62)

a. Downward-flow theory (also known as the trickle-down or top-down theory).

This is a result of upper class influence on the lower class.

b. Horizontal-flow theory (also known as the mass-market theory).

Fashions move horizontally between groups on similar social levels rather than vertically from one level to another.

c. Upward-flow theory (also known as the bottom-up theory).

This is a result of lower class influence on the upper class. [CTIB 004-00-11]

IV. Fashion Media

A. Consumer Publications. (TM-3)

1. Functions of fashion magazines.

a. Serves as reporter of fashions.

(1) Often take part in production and distribution of merchandise.
(2) Editors shop wholesale markets at home and abroad.
(3) Work closely with retailers and manufacturers.

b. Keeps readers informed about stores where featured merchandise can be bought.
c. Shares research studies with merchants in order to know consumer better.
d. Influences demand for certain fashion products among customers.

2. Examples of fashion magazines.

a. Vogue, Town & Country, Harper's Bazaar, Gentlemen's Quarterly, L'Officiel, Esquire - aimed at older readers with more money.
b. Seventeen and Ingenue - aimed at teenage market.
c. Mademoiselle and Glamour - aimed at college and young adult market. (SA-7)

B. Trade Publications.

1. Function of trade publications.

a. Analyzes fashion trends.
b. Discusses business conditions.
c. Covers conventions and other meetings of interest to industry.
d. Conducts market research.
e. Locates sources of supply for retailers and manufacturers.
f. Analyzes and reports on foreign markets.
g. Contains articles on how to produce, promote, and sell products.

2. Examples of trade publications.

a. Women's Wear Daily: the Bible of the female fashion industry.
b. Intimate Apparel, Handbags and Accessories, Boot and Shoe Recorder: aimed at a specific fashion industry.
c. Men's Wear: aimed at the masculine apparel and accessory industry. (SA-8)

[CTIB 005-00-11]
[CTIB 005-00-12]
[CTIB 005-00-13]

V. Trends

A. Definition.

A fashion trend is the direction in which fashion is moving.

Manufacturers or merchants must recognize whether fashions are moving toward or away from maximum acceptance. It is then that they decide whether to actively promote the fashion, to wait, or to abandon it. (SA-9)

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B. Factors which influence fashion trends.

1. Publicized people.

   These people influence fashion because they are colorful and intriguing in a way that is unique. An awareness of who these people are, what they are wearing, and to what degree they are admired is an important guide to the direction fashion is taking.

   a. Political leaders.
   b. Royalty.
   c. Theatrical personalities.
   d. Fashion models.
   e. "Jet set" fashion leaders.
   f. Designers.

      (1) Foreign.
      (2) Domestic.

2. Dominant events.

   Front page fashion is made from front page news. Wars, drastic stock market changes, new breakthroughs in science, and politics have all had dramatic effects on fashion. (Example: a consciousness of ecology brought earthtone colors and energy conservation brought the "layered look.")

3. Changes in ideas.

   a. Morals and mores.
   b. Art forms.
   c. Concepts of beauty.

4. Shifts in population distribution by age.

   The "Youth Market" and a consciousness of being youthful has been a result of the increased proportion of young people in our population.

5. Foreign influences.

   Fashion conscious travelers bring, exchange, and borrow fashion ideas from their travels.

6. State of the economy.

   The return of the "classics" and investment buying has been a result of inflation. Many claim a direct relationship between the hemline and the economy - long skirts, poor economy, or short skirts, good economy.

(PR-7; p. 20)

7. New fabrics and textures.

8. Television.

   All current trends gain great momentum by repeated exposure through commercials, television personalities who are supplied with clothes by fashion manufacturers and the personal rapport these personalities have with the consumer.

(SA-10)

[CTIB 006-00-11]
[CTIB 007-00-11]
[CTIB 007-00-12]

C. Fashion Forecasting

1. Sources of Data.

   a. Sales Data.

      Merchants need accurate figures available for study. They must be aware of sales figures, stock on hand, changes in customers' preferences, and the rate of sale of affected styles. Automation helps make these figures available for study much more quickly than ever before.

   b. Observations.

      The successful merchant will observe what is generally being worn. Observations are most helpful if they are made in terms of four elements of fashion: silhouette, detail, texture, and color.

      Successful forecasting requires that the merchant determine the target market of customers because the direction of a trend may vary in different age, income, and interest groups, and in differing geographical areas.

c. Trade and Consumer Publications.

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[CTIB 007-00-11]
[CTIB 007-00-12]

## VI. Designers

### A. Types of Designers.

1. Couture, "name", or high-fashion.

The "name" designer is well known to the fashion conscious customer. They are responsible for creating the designs, and choosing the fabric, texture, and color for their designs. They may even be involved in the development of the production model, as well as make plans for the promotion of the line. Many of these designers work for a firm, such as Gloria Vanderbilt for Murjanie, Inc., or Diane Von Furstenburg for Puritan. Today, these designers who were once associated only with original, expensive designs are licensing their names to manufacturers of accessories, home furnishings, cosmetics, and fragrances.

2. Stylist.

The stylist designer uses his or her creative talents to change or adapt the successful designs of others. They usually create designs at the late-rise or early mass production stage of the fashion cycle and must understand fabric and style construction as well as the manufacturing process because the designs are usually adapted at lower prices for mass consumption.

3. Free-lance artist.

This designer sells sketches to manufacturers. These sketches may be adaptations or original designs by the artist-designer. The designs may reflect the free-lancer's own ideas or the manufacturer's specifications. When the sketch is delivered to the manufacturer, the free-lancer's job ends.

### B. Fashion History and Designers.

1. Gilbert Adrian (1903-1959).

Adrian was probably responsible for more fashion trends than any other designer in the United States. He was Hollywood's highest-priced couturier, designing for such stars as Rudolph Valentino and Greta Garbo. He is associated with the 40's silhouette with its wide-shouldered tailored suits, dolman sleeves, tapered waist, and pin stripes. He worked with asymmetric lines, diagonal closings and huge ruffle-topped sleeves, and he was greatly influenced by wild animals, zoos, modern and Egyptian art.

2. Cristobal Balenciaga (1895-1972).

His fitted front, loose back coats and suits set the stage for an easier silhouette which followed the tautness of the "New Look." His famous brown lace dress in a two-piece style which bypassed the waistline was the direct ancestor of "unwaisted" styles.

3. Gabrielle "Coco" Chanel (1883-1971).

Chanel made the first short dresses in "humble" fabrics such as jerseys and tweeds. She was as responsible as anyone else for the 20's look with its movement away from corsets, ankle-length skirts, and long suit jackets. The loose-jacket suit and the jersey sports dresses are Chanel's greatest contributions to fashion history. She is known as the first modern dressmaker.

4. Christian Dior (1905-1957).

Natural shoulder lines, flared full skirts, fitted waistlines, and snug fitting suit jackets were the fashion brought into the "New Look" collection in 1947 by Dior.

5. Anne Klein (1921-1974).

She was the biggest single influence of clothes worn by active career women and set the example for the American look in sportswear. Her "Big Top" look was a trend setter for the sportswear fashion industry in '74.

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6. Madame Jeanne Lanvin (1867-1946).

   Her house became famous for elegance and the exquisite embroideries. Lanvin introduced "le robe" early in the 20's but was still making it in the early 40's. She was the first to create a men's wear department, in 1926. And she was the first to have her own perfume house, "My Sin" being the first perfume created.

7. Claire McCardell (1906-1958).

   McCardell concentrated on comfort and function and is credited with starting the "casual American look." Some of her many "firsts" were the monastic dress which was a loose flowing style which was belted by the wearer, harem pajamas, the bareback summer dress, and ballet slippers for street wear.

8. Captain Edward Molyneux (1894-1974).

   He was known as the designer for "ladies" and designed clothes that would make the woman stand out, not the dress. Molyneux is remembered for his classic style, simple and direct, for his purity of line in printed silk suits with pleated skirts, for his use of zippers to mold the figure, and his handkerchief point skirts. Many remember his use of navy blue with Gauguin pink and bois de rose as accents.

9. Normal Norell (1900-1972).

   He is acknowledged as dean of American designers. Norell was the first designer to receive the Coty American Fashion Critics' Aware due to his setting forth several fundamental trends that greatly affected the entire fashion industry: the sequin cocktail dress; the sweater-topped evening skirt; the revival of the chemise; and fur slacks that set a new fashion in loungewear.

10. Paul Poiret (1880-1944).

    Poiret banned the corset and created the brassiere. He introduced the "hobble skirt," making it difficult for women to walk. His fashions exhibited extreme orientalism and today his name is most frequently related to boldly colored, primary print motifs. Poiret was the first couturier to present perfume and was also the first designer to travel to foreign countries with his twelve mannequins.

11. Elsa Schiaparelli (1890-1973).

    Schiaparelli's fashion career was launched with her hand-knit sweaters in modern designs. She loved to try anything new and was one of the first designers to adopt the zipper for a fastener. She was considered a genius for the exotic accessories and bizarre use of color combinations. "Shocking pink" made her famous and her trademark was "ugly chic", a symptom of snobbish pre-war society.

12. Mme. Madeline Vionnet (1877-1975).

    She was the first designer in modern history to cut fabrics on the bias. She, along with Paul Poiret, took women out of corsets. The halter or cowl neckline resulted from this bias cutting. Working on a half-scale mannequin, Vionnet designed wide open necklines and over the head dresses and styles that reflected the curves of a woman's body.

C. Contemporary Designers

(PR-7; pp. 138-139)

1. Geoffrey Beene.
   a. Made Lynda Bird Johnson's wedding gown.
   b. In 1970, popularized the "Beene Bag", and men's wear.
   c. His influence is felt in jewelry, scarves, bathing suits, handbags, and perfume.
2. Bill Blass.
   a. Is noted for women's classic sportswear in men's fabrics.
   b. Women's sportswear is known as Blassport, men's sportswear is known as Blasslook.
   c. His influence is seen in luggage, scarves, men's grooming products, sheets, and towels.
3. Albert Capraro.
   a. Designs romantic but casual clothes combining luxury and comfort at a moderate price.
   b. Designed for First Lady, Betty Ford.

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4. Pierre Cardin.
   a. First Paris couturier to sell his own ready-to-wear (RTW).
   b. In 1966 developed the first "nude" look.
   c. His line includes men's, women's, and children's fashions and accessories that extend from ties to toiletries -also towels, sheets, blankets, and luggage.
   d. Is considered the leading couturier designing for both sexes.
5. Oleg Cassini.
   a. Was the official couturier for Mrs. John F. Kennedy.
   b. Men's wear collection is known and sold internationally.
6. Oscar de la Renta.
   a. In 1967, his Russian and Gypsy fashion themes were pacesetters for ethnic fashion period.
   b. In 1968, he became the leading American men's wear designer.
7. Anne Fogarty.
   a. Was the creator of the petticoated shirtwaist dress and the "Paper Doll" silhouette.
   b. Designed the first American bikini (tiny and feminine with rows of lace).
8. Hubert de Givenchy.
   a. Became famous for "Bettina" blouse (a peasant shape in shirting material with wide open neck and ruffled sleeves).
   b. In 1960, he introduced perfumes, 1972-men's cosmetics.
   c. Recently introduced men's underwear line and ladies stockings.
9. Gucci.
   a. Is mostly noted for production of leather goods.
   b. Quality of merchandise is controlled through the insistance of hand labor.
   c. Trademark is the noted "GG".
   d. His latest venture is collection of men's and women's apparel in RTW.
10. Halston.
    a. Began his career as millinery designer.
    b. Originated famous scarf hat.
    c. Designed pillbox hat for Mrs. John F. Kennedy.
    d. His simple classics made him most talked about designer of 70's.
    e. Plans for total, designing everything from ladies and men's RTW to luggage, to perfume, and to various accessories.
    f. Typical designs include the classic ultra-suede dress.
11. Calvin Klein.
    a. Is a contemporary classicist.
    b. Designs clothes which mix or match perfectly, and never overpower the woman who wears them.
    c. His signature color is "brown". His apartment, his clothes, his showroom and his car are brown and white.
    d. Designs sweaters, pants, skirts, dresses, shirts, coats, capes, and bedclothes.
12. Ralph Lauren.
    a. Chose "Polo" as trade name.
    b. Began his designing with men's ties.
    c. Was the wardrobe designer for leading male roles in the "Great Gatsby".
    d. Became known as the "new traditionalist" when he re-introduced the wide tie.
    e. Now designs male and female fashions of fine quality, exact detailing, and expensive pure fabrics.
    f. Recently introduced perfumes and men's toiletries in his line.
13. Mary Quant.
    a. Was the designer credited with starting the "Mod Look" of the 50's.
    b. Her styles took fashion from the rich and privileged and gave it to youth.

14. Yves St. Laurent.
    a. Is considered the most influential modern designer for the sophisticated woman.
    b. Is known for his trapeze line; pea jacket; and the nude look in see-through shirts and transparent dresses over nude body stockings (1966).

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D. **Additional Contemporary Designers**

1. Marc Bohan.
2. Donald Brooks.
3. Bonnie Cashin.
4. Giorgio Di Sant 'Angelo.
5. Diane Von Furstenberg.
6. Jordache.
7. Donna Karan.
8. Karl Lagerfeld.
9. Lacosta.
10. Guy Laroche.
11. Bob McIntosh.
12. Bob Mackie.
13. Mary McFadden.
14. Vera Maxwell.
15. Emilio Pucci.
16. Sasson.
17. Gloria Vanderbilt.

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[CTIB 008-00-12]
[CTIB 008-00-13]

E. Influence of Designers

(SA-11) (SA-12)

Perhaps more than at any other time in history, designers are influencing the fashion industry. The late 70's and early 80's show evidence of their influence in the demand being exhibited by both male and female consumers for "label" fashions. Blue jeans, once only for the less sophisticated, are an accepted fashion even in classier settings - but only if they bear the label of a designer name on the hip pocket. Perfumes and men's toiletries bear designer names and are turning into multi-billion dollar industries. Even children's clothes are carrying high-price tags and the name of a noted designer. Designer logos can be seen (and recognized by consumers) on everything from men's ties, towels and sheets, to luggage and other leather items. The 80's are truly a time for the designer to have a "heyday."

VII. Store Organization

A. Types of Fashion Retailers

(PR-7; pp. 230-247)
(PR-9; pp. 51-63)

1. Department store.

   Seeks to provide for customers of all ages and both sexes everything they need or want in the way of wearing apparel and home furnishings.

    a. Store is divided into separate departments, each department having a manager and/or buyer.
    b. Most consist of a downtown store and suburban satellite stores located in prime shopping areas.
    c. Operate with a "Flagship Division" - the downtown or central location where executive, merchandising, and promotional staffs are concentrated.
    d. Offer services such as delivery of merchandise, privileges of credit, and personal service of trained sales staff.

2. Junior Department Store.

   Fully departmentalized, but carries few or none of the home furnishings line.

3. Exclusive Specialty Shop.

   Deals with single type of merchandise, catering to a wealthy and fashion-minded clientele.

    a. Strength of shop lies in its distinctive merchandise and prestige as fashion authority.
    b. May deal in men's and/or women's apparel and accessories.

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4. Other Specialty Shop.

   Carry a large assortment of merchandise within the narrow limits of customer's personal needs such as maternity fashions, or fashions for the exceptionally tall or stout or tiny.

5. Variety store.

   Makes quick selection of low-priced merchandise available to customers by use of check-out counters, racks and bins, and shopping baskets.

6. Demonstration Store.

   Highly specialized store that is run for the benefit of a single manufacturer's goods, such as a cosmetic line (Merle Norman).

7. Discount House.

   Deals with mass distribution with minimum service and emphasis upon bargains.

8. Franchise Store.

   Owned by a local manager who buys most of the merchandise from the franchisor in order to use the firm's name. Parent firm helps select the site, designs the store and fixtures, and supplies all or most of the merchandise.

9. Chain Store.

   Group of stores, centrally owned, each handling very similar goods that are merchandised from a central headquarters.

10. Boutique Shop.

    Small store with special quality and flavor that comes from the individuality of its merchandise and the attractive, non-traditional way in which the merchandise is presented.

    a. Tries to group merchandise in a way that the customer will wear it, making it easier and more convenient to shop for a total look.
    b. The decor of the boutique is another element that sets it apart from conventional stores.
    c. If a boutique style becomes a popular best seller, the boutique usually loses interest in it as they are dedicated to newness, exclusively, and few of a kind designs.

(SA-13)

B. Leading Fashion Department Stores

1. Macy's.
2. Hudson's.
3. Marshall Field & Co.
4. May Co.
5. Bloomingdale's.
6. Abraham & Straus.
7. Foley's.
8. Bullock's.
9. Lord & Taylor.
10. Jordan Marsh.
11. Rich's.
12. I. Magnin.

VIII. Career Opportunities in Fashion Industry

(PR-7; pp. 448-465)

A. Careers in Manufacturing.

1. Raw Materials Industries.
2. Apparel Trades.
3. Accessories Trades.
4. Home Sewing.

Opportunities in these industries include: fashion experts, fabric designers, fabric librarians, fabric stylists, educational and industry consultants, apparel and accessories designers, assistant designers, pattern makers, sketchers, sample makers, showroom and sales representatives, coordination and publicity.

B. Careers in Retailing

1. Merchandising Careers.

   a. Sales.

b. Head of stock.

Responsible for the condition of stock in the department and reports any information to the buyer.

c. Department manager.
d. Assistant buyer.
e. Buyer.

Responsible for buying merchandise for a department, a store, or a group of stores, running each as a profitable business operation.

f. Divisional merchandise manager.

Coordinates merchandising efforts of several departments.

g. General merchandise manager.

Heads merchandising efforts of several departments or group of stores.

h. Top management.

Responsible for every phase of the store's operation and directions.

2. Sales Promotion Careers.

a. Advertising staff.
b. Publicity and public relations staff.
c. Visual merchandising staff.
d. Fashion coordination.

This career is partly merchandising and partly promotion - involves working with a great many people, from merchandise information resources to store staff to customers and makes recommendations rather than giving direct orders. Buyers often stake part of the budget on the coordinator's judgment, advertisements are written in line with these judgments, and sales training sessions are staged with the help of the fashion coordinator.

3. Sales Supporting Careers.

a. Training department.
b. Personnel department.
c. Accounting department.
d. Customer services and adjustments.

4. Resident Buying.

a. Market representative.

Work in fashion market daily looking at lines, checking on supply and delivery conditions, and analyzing new trends - work with buyers of stores they represent.

b. Fashion coordinator.

Knows the market, does fashion forecasting, and works with member stores' management staffs and fashion offices.

C. Careers in Fashion Service Organizations

1. Advertising Agencies.

a. Account executive.
b. Copywriter.
c. Artist.
d. Fashion coordinator.
e. Clerical and secretarial.

2. Consumer Publications.

a. Fashion editor.

Must discover what readers respond to, locate the fashion market, and illustrate examples of the right fashions at the right time - this includes writing press releases for wire services and going into the market for current fashion information.

b. Merchandising.

Work to make sure readers anywhere in the country can buy editorially featured merchandise and also offer retailers practical advice about how to merchandise, promote, and display featured items.

c. Advertising Sales.

D. Trade Publications

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E. Consulting Services

Syndicated service which covers and interprets news so that subscribers can be guided by view of skilled observers in successful buying, merchandising, and coordinating activities.

F. Television

Fashion oriented specialists create fashion commercials for client producers and retailers.

G. Trade Associations

Involve research, publicity, public relations work, handling legislative contacts, conventions, publishing periodicals, running trade shows, and other services which members may require - example, National Retail Merchants Association.

H. Entrepreneurship

Owning your own store.

# STUDENT ACTIVITIES

## OVERVIEW OF THE FASHION INDUSTRY

SA-1 INSTRUCTIONS TO THE TEACHER: (See page 20) Give students 20 to 25 minutes to see how many words they can locate in the puzzle. Students should leave the puzzle turned face down until they are given a starting time.

You may choose to make an overhead transparency of the puzzle and divide the class into two teams. Flip a coin to see which team goes first. Team members are to take turns coming to the overhead projector and circling the word they have discovered in the puzzle. A team receives one point for circling each new word. If the same team member is able to define the word s/he has circled, that team receives an additional point. When a team member fails to circle and define a word, that team looses a turn. If a member of the opposing team can define the word missed by the competing team, then his/her team receives two (2) points. Each team member must receive a turn before starting through second turns. There are thirty-nine (39) words in the puzzle. Some of the words are given more than once; however, repetition builds familiarity. Two (2) words are circled on the puzzle to serve as examples for the students.

SA-2 Students are to bring to class any apparel and accessory items they can possibly locate that are of any significance to fashion history. The items may range from hats, gloves, bags, jewelry, undergarments, shoes ties, coats, etc. to skirts, dresses, slacks. Many of these items may be secured from the students' own attics or basements or from friends and relatives.

The students should tell the class the period of time in which the item(s) was/were fashionable and point out any significant features, styles, or details of the item(s) as they relate to the past and to the styles of today.

SA-3 Have the students read Guide to Fashion Merchandise Knowledge, Volume I., pp. 45-68.

SA-4 Have students create a bulletin board or a display with fashions dating from the 1900's - 1980's. This may be designed using actual items or through magazine illustrations, sketches, or other original ideas of students. Competition always stimulates creativity. Divide the class into two or three teams to see which team can have the most interesting and creative project.

SA-5 Students are to bring to class and report on a newspaper or magazine article that relates to the influence society has on the fashion industry. The articles may relate to ecology, war, movies, designers, etc.

SA-6 If possible, give each student a consumer or trade publication or allow students to share magazines. Have students look through these for fashion promotions (cosmetics, men's toiletries, apparel and accessory items). Have the students explain what psychological impact these promotions are trying to have on the consumer. (i.e. sexual attractiveness, comfort, leadership, social approval, etc.)

SA-7 Give students magazines and have them look for the incoming trends for the season. Only allow the students approximately 15 to 20 minutes to do this. Then ask them to report to the class at least one trend they noted that was dominant in their particular magazine. They should also cite the magazine they used, as this will determine styles for various ages and sex. (Students should note colors, lengths, lapel widths, sleeve styling, cosmetic colorings, hair treatments, etc.)

SA-8 Have two or three students share a trade publication. Let the students discuss in their small groups the information they found to be evident in this type publication compared to information they find in consumer publications. After students have discussed these differences in their small groups, have a member of the group report or discuss their findings with the entire class. (They should find that more of the information is directed to the industry rather than to consumers, including information such as consumer research surveys, supplier information, business economics, conventions, etc.)

SA-9 Have several students interview the buyers or department managers of apparel and accessories in the leading fashion stores in the community (this should include coverage of male, female, and children's apparel and accessories). Students may use the interview questions provided for this activity as a guideline. They should report their findings to the class. See page 22.

SA-10 Divide the class into three or four groups. Give the groups about five (5) minutes together to see which group can list the most television and movie personalities that help to set fashion trends and influence consumers. (Example: Johnny Carson, Magnum, Farah Fawcett Majors)

SA-11 Have students bring any available designer label fashions to class. (This could include apparel and accessories, perfumes and toiletries, luggage, belts, glasses, linens, stockings, etc.) Discuss the costs of designer label merchandise compared to national or private brand label merchandise.

SA-12 Divide the class into three or four groups, depending on the class size. Each group is to develop two (2) posters. The first poster is to exhibit the names of several designers and the second is to include illustrations showing their designs for this season.

SA-13 Have the student interview five people of assorted ages, sex, and race to find out which store is their #1 preference when shopping for apparels and accessories. Indicate why they have this preference and do they know what type of store their favorite store represents, such as boutique, specialty shop, department store, etc.

## FASHION MERCHANDISING TERMINOLOGY

Find as many fashion merchandising terms in this word puzzle as you possibly can in the allotted time. The words may be found vertically or horizontally in the puzzle. DO NOT BEGIN UNTIL INSTRUCTED TO DO SO.

B A P P A R E L M O U L C E X W C P B L I N G E R I E N O Q V Y

K T W C D E R W Y X V U O P Q T X Y R W C E A C H U O W R C W X

Q W E R E T A I L I N G Y I O W T P X R Y J R A G S H E I O P W

Y U E R B A S I C S T O C K I P R Y I O W I M H G L X H Y W E I

X V Y C Y I D C S W B I W O P L I N G E R I E H W E Y U I O P W

X Y W I O L X P W E I O P W R B Y W I X P W N C N E O P H W Q U

Z Y W I O I N T I M A T E A P P A R E L V C T M I P W R E C W X

U W Y Z I N E R T A A B R E T U P E R I O D D N Q E V C D R T Y

O D E S I G N O P R E T A I L I N G U I O P I X P R I C E X I O

Z X C I Q W E R V K B R G L O P T O P H O U S E Q W E R T Y X P

Q R U L I N E V B E E G S H J K L W R U I O T E X T U R E W E R

P E R H F E C T H T R A F F I C L L I Q W E R Y U I O P X E R T

C U C O S T U M E H I C G H I O Q W C R X E I C R V T B Y U L F

W R T U I O X E C F G C H E W S X E E V B W C B W C T B Q W E B

I P R E E C T B Q W X E S E S T O P Q W X T T U R N O V E R Y B

X Z W T H O T I T E M S C T R U N K S H O W Y U I O P E W T B Q

B N N T Y U I O P Q E O C T B M W E T Y C O Q R T C I N B N O P

B N W E U I O P R Y R R I O R E A D Y T O W E A R Q R D C O E I

Y U B I O U G T R E C I J K L P G E E T U C Y V E N D O R P G F

Q M E R C H A N D I S E H J I O P T B R T X E B Q X T R A G S Z

I O P W E R T Y E V C S T Y L E H A N M U E T Y U I O P G J K L

Q R T Y X I O P T E T Y U I I L P I X H R E S O U R C E S O P W

U I P R I C E R A N G E W E N U O L X I I X E T W R E C W R T B

U P E R I G H I I X N W G Y E I O S X R E B I W O P Q W X T Z S

S R T W E B W Q L B I O P E B I O X P V R I U W O P B Q E B X W

W B Q T X T W B S O P W T B Y I W H O P G H I W P Q W T X B Y I

KEY:

# FASHION MERCHANDISING TERMINOLOGY

Find as many fashion merchandising terms in this word puzzle as you possibly can in the allotted time. The words may be found vertically or horizontally in the puzzle. DO NOT BEGIN UNTIL INSTRUCTED TO DO SO.

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B A P P A R E L M O U L C E X W C P B L I N G E R I E N O Q V Y
K T W C D E R W Y X V U O P Q T X Y R W C E A C H U O W R C W X
Q W E R E T A I L I N G Y I O W T P X R Y J R A G S H E I O P W
Y U E R B A S I C S T O C K I P R Y I O W I M H G L X H Y W E I
X V Y C Y I D C S W B I W O P L I N G E R I E H W E Y U I O P W
X Y W I C L X P W E I O P W R B Y W I X P W N C N E O P H W Q U
Z Y W I O I N T I M A T E A P P A R E L V C T M I P W R E C W X
U W Y Z I N E R T A A B R E T U P E R I O D D N Q E V C D R T Y
O D E S I G N O P R E T A I L I N G U I O P I X P R I C E X I O
Z X C I Q W E R V K B R G L O P T O P H O U S E Q W E R T Y X P
Q R U L I N E V B E E G S H J K L W R U I O T E X T U R E W E R
P E R H F E C T H T R A F F I C L L I Q W E R Y U I O P X E R T
C U C O S T U M E H I C G H I O Q W C R X E I C R V T B Y U L F
W R T U I O X E C F G C H E W S X E E V B W C B W C T B Q W E B
I P R E E C T B Q W X E S E S T O P Q W X T T U R N O V E R Y B
X Z W T H O T I T E M S C T R U N K S H O W Y U I O P E W T B Q
B N N T Y U I O P Q E O C T B M W E T Y C O Q R T C I N B N O P
B N W E U I O P R Y R R I O R E A D Y T O W E A R Q R D C O E I
Y U B I O U G T R E C I J K L P G E E T U C Y V E N D O R P G F
Q M E R C H A N D I S E H J I O P T B R T X E B Q X T R A G S Z
I O P W E R T Y E V C S T Y L E H A N M U E T Y U I O P G J K L
Q R T Y X I O P T E T Y U I I L P I X H R E S O U R C E S O P W
U I P R I C E R A N G E W E N U O L X I I X E T W R E C W R T B
U P E R I G H I I X N W G Y E I O S X R E B I W O P Q W X T Z S
S R T W E B W Q L B I O P E B I O X P V R I U W O P B Q E B X W
W B Q T X T W B S O P W T B Y I W H O P G H I W P Q W T X B Y I
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## SUGGESTIONS FOR INTERVIEWING

## THE BUYER/DEPARTMENT MANAGER OF A LEADING FASHION STORE

1. What are the incoming trends across the nation for this season? (Examples: "The look", dominant colors, accessories, hemlines, coat lapels, tie widths and styles, neckline treatments, silhouette, sleeve styles, etc.)
2. Will these same trends be true for this geographical area?
3. If not, what are the expected trends for this community?
4. What trends appear to be declining across the country?
5. What trends appear to be declining in this geographical area?
6. What is the target market (age, income, race, etc.) for this particular store?
7. What fashions will this store carry more of this year than they did in this same season last year?
8. Which fashions will this store carry less of this year than it did in this same season last year?
9. What are the reasons for the answers to "7" and "8"?

## Unit I - Fashion Overview

| | |
|---|---|
| HO-1 | Fashion Merchandising Vocabulary |
| TM-1 | The Fashion Image |
| TM-2 | Fashion Cycles |
| TM-3 | Fashion Media - Using magazine titles (i.e. *Madamoiselle*, *Glamour*, *Gentlemen's Quarterly*) develop a collage or bulletin board. |

# FASHION MERCHANDISING VOCABULARY

ACCESSORIES: items which are worn with larger items such as dresses, suits, sportswear; includes jewelry, neckwear, small leather goods, millinery, gloves, hosiery, shoes, etc.

APPAREL: those items a person wears or carries in order to complete an outfit. In the industry "apparel" refers only to sportswear, coats, dresses, and suits.

BASIC STOCK: those items which are in constant demand and should always be kept in stock throughout a season or year.

BEST SELLER (or RUNNER): merchandise that sells fast throughout the season or year and is reordered many times in order to meet customer demand.

BUYER: the person responsible for budgeting and planning the expenditures for a business, selecting the actual merchandise for resale, and deciding what is to be advertised or displayed and why.

COSTUME: refers to suit, coat, or dress, with coordinated accessories.

COUTURE HOUSE: apparel firm for which designer original styles are created.

COUTURIER (m.) or COUTURIERE (f.): male or female proprietor or designer of a French couture house.

DESIGN: a particular version, interpretation, or variation of a style; often referred to as a "style" in the fashion industry.

DESIGNER: person who creates original garments in the fashion industry.

DETAILS: specific elements which give a silhouette its form or shape.

EXCLUSIVE MERCHANDISE: merchandise confined to a particular store within a given trading area and not available in other stores in that metro market.

FASHION FORECASTING: predicting the trend of fashion according to prevailing elements in all the fashion industries.

FASHION IMAGE: reflects the degree of fashion leadership the store exercises.

FOUNDATIONS: trade term for women's undergarments.

GARMENT DISTRICT: refers to the area in any city where the fashion industry is dominant; Seventh Avenue in New York City is referred to as the "Garment District."

HOT ITEMS: items which demonstrate greater customer acceptance than was expected.

IMPULSE ITEMS: merchandise purchased on spur of the moment decision rather than as a result of planning.

INTIMATE APPAREL (or LINGERIE): trade term for women's lingerie, foundations, and loungewear.

KNOCK-OFF: a close reproduction of design of an apparel or textile product which sells for a lower price than the original.

LINE: a collection of styles offered by a manufacturer or designer.

LINGERIE: see "intimate apparel."

LOW END: least expensive merchandise.

MARKET: group of potential consumers; also refers to the area in which merchandise is bought and sold.

MARKETING: those business activities connected with directing the flow of goods from the producer to the consumer.

MARKET WEEK: the week in which buyers attend fashion showings by wholesalers to view the lines for a particular season.

NATIONAL BRAND: merchandise which is nationally advertised and distributed by a manufacturer.

OPEN-TO-BUY: the amount of money available for the buyer to spend during a specified period.

ORIGINAL: design created for showing in a collection; however, duplicates of the design are often made for selling and are called "repeats."

PRICE LINE: specific price point at which a merchandise assortment is regularly offered for sale.

PRICE RANGE: the spread between the lowest and highest price at which a product is offered for sale.

PRIVATE BRAND (or PRIVATE LABEL): merchandise developed for a given store and carrying that store's label.

RAGS: slang term for apparel.

READY-TO-WEAR: apparel which is mass produced to standard size measurements.

HO-1

RESOURCE: merchant from whom a store buys or accepts merchandise; also known as a "vendor."

RETAILING: the purchasing of merchandise for resale to the ultimate consumer.

RUNNER: see "best seller."

SEASONAL MERCHANDISE: merchandise purchased for a particular season to meet customer demand.

SEVENTH AVENUE: New York's garment district.

SILHOUETTE: the overall contour or outline of a costume; also referred to as "shape" or "form."

SKIMMING THE CREAM: being first with the "most wanted" items and having enough in stock to meet customer demand during the stimulated sales period.

SLEEPER: a fashion overlooked by buyers or fashion editors which becomes popular without promotion and becomes a potential "hot item" with aggressive promotion.

STORE IMAGE: the personality that is presented to the public by the store.

STORE'S OWN BRAND (S. O. B.): merchandise which is presumably less expensive than national brands and is the private brand of the store.

STYLE: a specific design of one garment which stays constant; such as the princess, shirtwaist, and double-breasted styles.

STYLE PIRACY: see "knock-off."

13th MONTH: refers to the five shopping days between Christmas and New Year's.

TEXTURE: the look and feel of various materials and fabrics.

TOP HOUSE: the largest and best-known of the fashion houses.

TRAFFIC: the number of potential and actual customers who enter the store or department.

TRUNK SHOW: pre-testing of current line samples; involves a producer's sending a representative to a store with samples to exhibit to customers at scheduled, announced showings.

TURNOVER: number of times in a given period that merchandise in stock is sold and replaced.

UNISEX MERCHANDISE: apparel and accessories designed for both men and women.

VENDOR: see "resource."

VISUAL MERCHANDISING: previously known as display; presenting merchandise for maximum traffic exposure and for visual sales appeal.

YOUTH MARKET: population under 25 years of age who are primarily interested in the new, unusual or different; often in opposition to the older generation.

TM-1

# THE FASHION IMAGE

10 years before its time a fashion looks . . . . . INDECENT

5 years before its time a fashion looks . . . . . SHAMELESS

1 year before its time a fashion looks . . . . . OUTRAGEOUS

In its time a fashion looks . . . . . . . . . . . SMART

1 year after its time a fashion looks . . . . . . DOWDY

10 years after its time a fashion looks. . . . . . HIDEOUS

20 years after its time a fashion looks. . . . . . RIDICULOUS

30 years after its time a fashion looks. . . . . . AMUSING

50 years after its time a fashion looks. . . . . . QUAINT

70 years after its time a fashion looks. . . . . . CHARMING

100 years after its time a fashion looks. . . . . . ROMANTIC

150 years after its time a fashion looks. . . . . . BEAUTIFUL

# FASHION CYCLES

FIGURE I

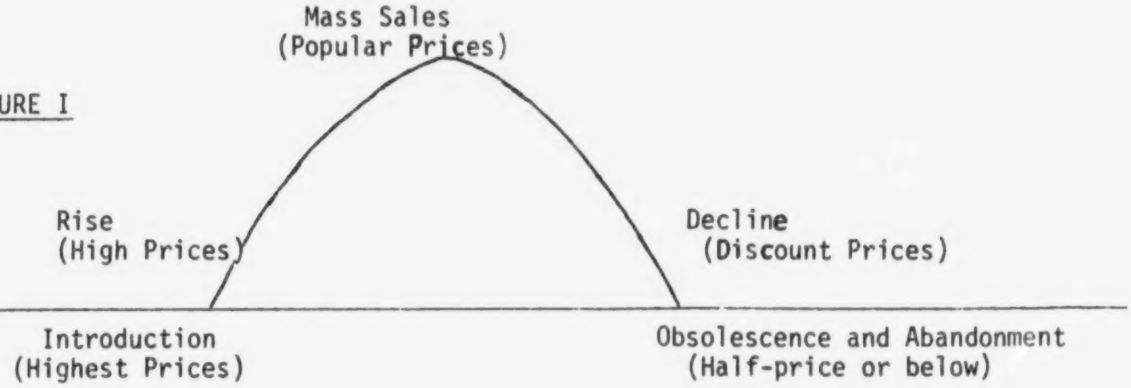

Mass Sales
(Popular Prices)
Rise
(High Prices)
Decline
(Discount Prices)
Introduction
(Highest Prices)
Obsolescence and Abandonment
(Half-price or below)

FIGURE II

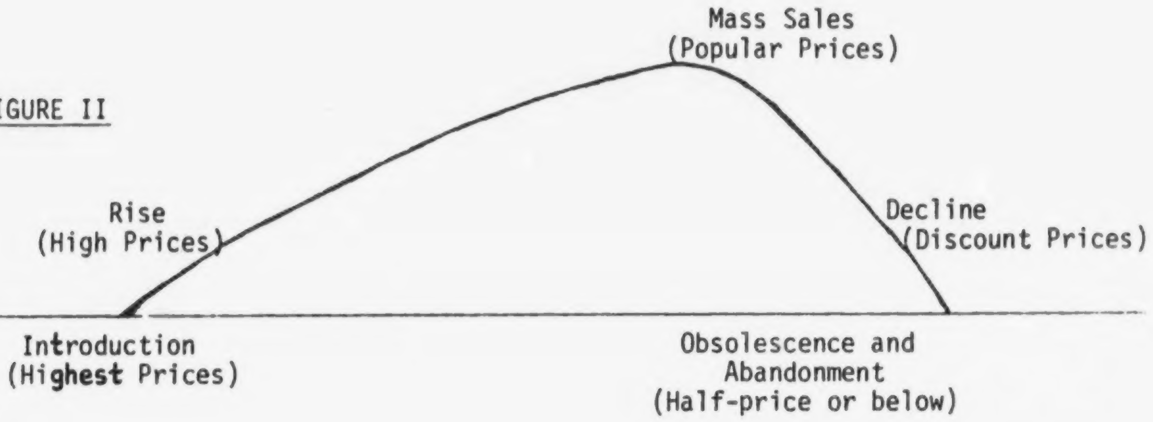
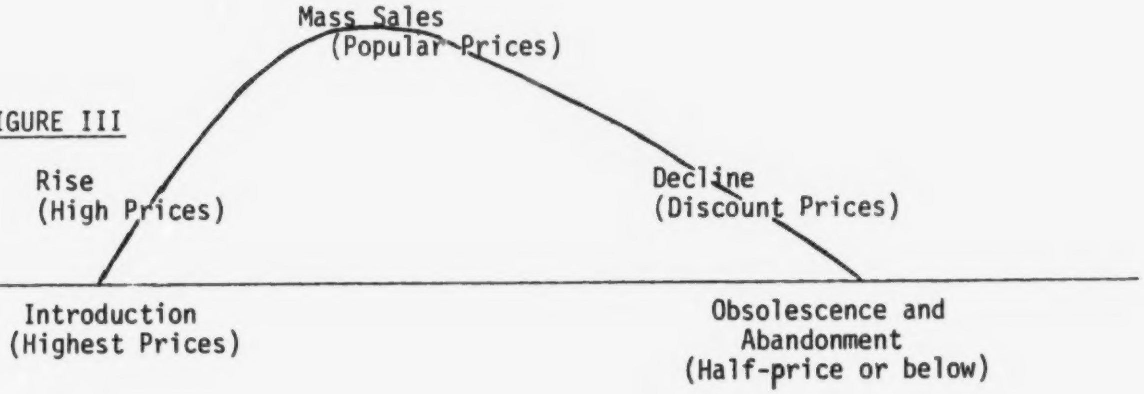

Mass Sales
(Popular Prices)
Rise
(High Prices)
Decline
(Discount Prices)
Introduction
(Highest Prices)
Obsolescence and
Abandonment
(Half-price or below)

FIGURE III


Mass Sales
(Popular Prices)
Rise
(High Prices)
Decline
(Discount Prices)
Introduction
(Highest Prices)
Obsolescence and
Abandonment
(Half-price or below)

The highest point of the curve represents the relative quantity of sales at that point as compared with any other point. The horizontal axis represents the period of time it takes for the fashion to reach acceptance and then become abandoned. Figure I is representative of a short-run cycle (fads). Figure II and III are representative of long-run cycles, depending on the familiarity of the fashions when they are introduced (staple and classic or basic fashions).

# EVALUATION MEASURES AND KEYS

(COMPETENCY / TEST - ITEM BANK)

# TABLE OF SPECIFICATIONS FOR TEST CONSTRUCTION

PROGRAM AREA Marketing and Distributive Education

COURSE NAME Fashion Merchandising

UNIT Overview of the Fashion Industry

| Competency | EXPECTED STUDENT OUTCOME | | | | % Importance | Total No. of Items |
|---|---|---|---|---|---|---|
| | Cognitive Level* I | II | III | Performance | | |
| 001. Demonstrate knowledge of fashion industry terminology. | X | X | | | | |
| 002. Demonstrate knowledge of fashion history and how it relates to today's fashion. | X | | X | | | |
| 003. Demonstrate knowledge of the fashion industry's cycles of merchandise acceptance. | X | X | | | | |
| 004. Demonstrate knowledge of the geographic movement of fashion. | X | | | | | |
| 005. Read current fashion and trade magazines and newspapers to keep informed of current trends. | X | | | | | |
| 006. Adjust and adapt to new and unique ideas and situations. | X | X | | X | | |
| 007. Identify incoming fashion trends. | X | X | | X | | |
| 008. Demonstrate knowledge of the leading fashion designers, characteristic features of their fashions, trends they are currently setting, etc. | X | X | X | | | |
| 09. Identify ways fashion designers influence the sale of apparel and accessory merchandise. | | X | | | | |
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*LEVEL I - Recall, II - Comprehension, III - Application

COMPETENCY 001: Demonstrate knowledge of fashion industry terminology.

TEST ITEM 001-00-11

INSTRUCTIONS TO STUDENTS: Read each of the following statements about fashion industry terminology and determine if each statement is true or false. Write the correct response (true or false) in the blank to the left of each statement.

__________ 1. Staple fashions are often very daring and are the favorite garments of the "most" fashion conscious person.

__________ 2. The style of an article is those characteristics of that particular article which make it different from other articles of the same type.

__________ 3. Private brands are those which are advertised and sold over the United States in a variety of stores and are the most popular names in fashion.

__________ 4. The largest and best known fashion houses are called "top houses."

__________ 5. A fashion image is the thought which comes to mind when a person thinks of the personality of a particular store, designer, or garment.

TEST ITEM 001-00-12

INSTRUCTIONS TO STUDENTS: **Read each of the following incomplete sentences.** Determine which of the completion choices is most appropriate for each statement. Write the letter of this response in the space provided to the left.

_____ 1. Goods that carry the label of the retailer who sells them, rather than a manufacturer's brand name, are called:

a. sample brands.
b. private brands.
c. national brands.
d. retailer brands.

_____ 2. Fashions which are accepted by a large group of people for a very short period of time are:

a. high fashions.
b. haute couture fashions.
c. fad fashions.
d. classic fashions.

_____ 3. A fashion which will be in good taste and style over an extended period of time and will therefore be a good investment is a:

a. haute couture fashion.
b. classic fashion.
c. staple fashion.
d. custom-made fashion.

_____ 4. A copy of an original designer fashion is known in the fashion industry as:

a. a haute couture fashion.
b. a knock-over.
c. a sleeper.
d. a knock-off.

_____ 5. The entire collection shown at the beginning of a season by a designer or manufacturer is known as a:

a. line.
b. runner.
c. style.
d. fashion show.

TEST ITEM 001-11-13

INSTRUCTIONS TO STUDENTS: In Column I are statements defining fashion terminology. From the terms in Column II, select the one which is most appropriate for each item in Column I. Record the letter of your choice in the space provided to the left.

COLUMN I

_____ 1. The prevailing style accepted and used by a particular group of people at a particular time.

_____ 2. Fashions accepted by the elite among consumers, those who are first to accept fashion change.

_____ 3. Styles widely accepted that are manufactured and sold in large quantities at moderate to low prices.

_____ 4. Everything that a person wears or carries to complete an outfit.

_____ 5. The characteristic or distinctive way a garment looks that makes it different from other garments.

_____ 6. A specific interpretation or variation of a style.

_____ 7. A short-lived fashion.

_____ 8. A style or design that remains "in fashion" over a long period of time.

COLUMN II

a. apparel

b. classic

c. design

d. fad

e. fashion

f. high fashion

g. mass fashion

h. style

COMPETENCY 002: Demonstrate knowledge of fashion history and how it relates to today's fashion.

TEST ITEM 002-00-11

INSTRUCTIONS TO STUDENTS: Read each of the following statements about the history of fashion merchandising and determine if each statement is true or false. Write the correct response (true or false) in the blank to the left of each statement.

__________ 1. "Flapper" was a term applied to certain fashionable women of the 30's.

__________ 2. Christian Dior introduced the "New Look" in the 40's.

__________ 3. The fastest growing clothing classification in the early 70's was that of sportswear and the casual look.

__________ 4. In the 20's women were greatly influenced in fashion by the images of beauty which they saw on the movie screen.

__________ 5. The chemise or "sack" dress was introduced to America in the 20's and again in the 50's.

EST ITEM 002-00-12

INSTRUCTIONS TO STUDENTS: In Column I are statements describing historical fashions since the 1900's. From the terms in Column II, select the one which is most appropriate for each item in Column I. Record the letter of your choice in the space provided to the left.

COLUMN I

_____ 1. Grew in popularity due to the war restrictions on fabric and became the working girl's basic fashion.

_____ 2. Completely loose unbelted dress that swept the country in the late 50's.

_____ 3. Name given to the fashion conscious woman of the 20's who followed fashion to the limit.

_____ 4. High-waisted skirt fitting close to the hips and caught in a straight band across the front.

_____ 5. The look of the 40's with feminine curves, tiny waist, great fullness, and longer shirts.

_____ 6. Known in the 80's as the "Preppy" look.

COLUMN II

a. Flapper

b. Gibson Girl

c. "Hobble" skirt

d. Ivy-League look

e. "New Look"

f. Sack or chemise

g. Shirtwaist dress

TEST ITEM 002-00-13

INSTRUCTIONS TO STUDENTS: Given the following fashions in Column I, in Column II tell the decade the fashion became popular, and in Column III give the reason it became popular. The reason may either by a sociological factor or an economical factor.

| COLUMN I (Fashion) | COLUMN II (Decade it became popular) | COLUMN III (Reason for the popularity of the fashion) |
|---|---|---|
| (1) Leisure suit for men | | |
| (2) Chemise (Not the "sack") | | |
| (3) Shirtwaist | | |
| (4) Dirndl | | |
| (5) Pants and Pantsuits for Women | | |

COMPETENCY 003: Demonstrate knowledge of the fashion industry's cycles of merchandise acceptance.

TEST ITEM 003-00-11

INSTRUCTIONS TO STUDENTS: Read each of the following statements about fashion cycles and determine if each statement is true or false. Write the correct response (true or false) in the blank to the left of each statement.

__________ 1. The general trend of any fashion cycle is that a style is born, matures, and dies.

__________ 2. Fashions that are unfamiliar to consumers tend to rise very quickly in the fashion cycle as customers are always looking for something very new and different.

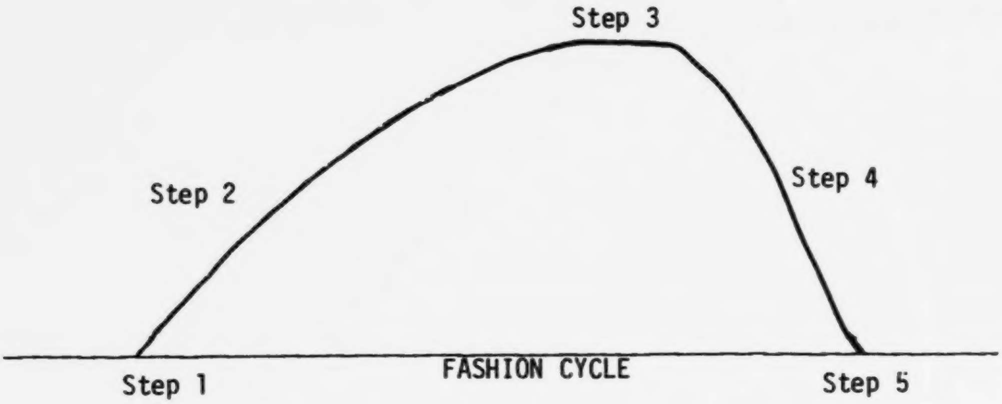
__________ 3. Fashions that rise quickly in acceptance and decline quickly in popularity are known as "fads."

__________ 4. Fashion cycles aid the buyer in effectively timing the markdowns of merchandise.

__________ 5. The prices are most expensive to the consumer when the new merchandise has reached mass sales and everyone wants to buy the same thing.

TEST ITEM 003-00-12

INSTRUCTIONS TO STUDENTS: A skeleton fashion cycle is provided below. Each step on the fashion cycle is numbered. In Column I, identify the step of the fashion cycle with its corresponding number. In Column II, identify the price level at which the merchandise is generally offered for that particular step on the cycle.



| | COLUMN I<br>(Identify the step) | COLUMN II<br>(Identify the price level) |
|---|---|---|
| Step 1 | | |
| Step 2 | | |
| Step 3 | | |
| Step 4 | | |
| Step 5 | | |

48

TEST ITEM 003-00-13

NSTRUCTIONS TO STUDENTS: In Column I are statements related to the fashion cycle of merchandise acceptance. From the fashion cycle terms in Column II, select the one which is most appropriate for each item in Column I. Record the letter of your choice in the space provided to the left.

COLUMN I

_____ 1. Racks of merchandise are greatly reduced in price in the retail stores.

_____ 2. Manufacturers begin to copy the new design in such a way that it can be mass produced at popular prices.

_____ 3. The new design is produced in small quantities at high costs to the consumer who wants something "new and different."

_____ 4. Manufacturers completely discontinue making the style and the retailer marks the items at half-price or less.

_____ 5. The design is at its peak in public sales acceptance and the retailer is making an acceptable profit.

COLUMN II

a. Decline in popularity

b. Introduction of fashion

c. Mass sales of fashion

d. Obsolescence

e. Rise in popularity

**COMPETENCY 004**: Demonstrate knowledge of the geographic movement of fashion.

TEST ITEM 004-00-11

**INSTRUCTIONS TO STUDENTS**: Read each of the following statements about the influence of fashion on society and determine if each statement is true or false. Write the correct response (true or false) in the blank to the left of each statement.

__________ 1. According to the downward-flow theory, the lower class would not be affected by the fashion trends set by the upper class.

__________ 2. Geographic factors play a big role in whether or not certain fashion trends are accepted for a specific area of the country.

__________ 3. The increase in sales promotion and communications has helped make the country fashion conscious.

__________ 4. The increased demand for "designer label" merchandise has resulted in increased competition among designers.

__________ 5. When fashions move horizontally between groups on a similar social level rather than going up or down from one level to another, the fashion influence theory is known as the mass-market theory.

COMPETENCY 005: Read current fashion and trade magazines and newspapers to keep informed on current trends.

TEST ITEM 005-00-11

INSTRUCTIONS TO STUDENTS: List six magazines and newspapers that are informative of current trends in fashion. Beside each indicate whether it is a trade magazine/newspaper or consumer magazine/newspaper.

| MAGAZINE/NEWSPAPER | TRADE/CONSUMER |
|---|---|
| 1. | |
| 2. | |
| 3. | |
| 4. | |
| 5. | |
| 6. | |

TEST ITEM 005-00-12

INSTRUCTIONS TO STUDENTS: Read each of the following statements about fashion media and determine if each statement is true or false. Write the correct response (true or false) in the blank to the left of each statement.

__________ 1. Consumer publications help to locate sources of supply for retailers and manufacturers.

__________ 2. L'Officiel emphasizes haute couture fashion and aims its publication at the more mature readers with more money.

__________ 3. Women's Wear Daily is a consumer publication aimed at the housewife who wants to know the trends that are being set daily in the fashion industry.

__________ 4. Major functions of trade publications, such as Men's Wear, include the analysis of fashion trends and the conducting of market research.

__________ 5. Consumer publications have a definite influence on the demands for certain fashion products among customers.

TEST ITEM 005-00-13

INSTRUCTIONS TO STUDENTS: Below are listed seven fashion magazines. In the spaces provided on the right, indicate the market to which each magazine aims for readership.

1. Mademoiselle __________________________

2. Gentlemen's Quarterly __________________________

3. L'Officiel __________________________

4. Seventeen __________________________

5. Esquire __________________________

6. Vogue __________________________

7. Glamour __________________________

COMPETENCY 006: Adjust and adapt to new and unique ideas and situations.

TEST ITEM 006-00-11

I. In the blank space provided, give a definition of the term "fashion trend."

A fashion trend is ______________________________

______________________________

II. Certain groups of people have a major influence on fashion trends. From your studies, list at least four (4) groups of people who might directly influence fashion trends.

a. ______________________________

b. ______________________________

c. ______________________________

d. ______________________________

III. Factors other than people often have a direct influence on the trends in fashion. In the space provided, identify at least four (4) factors (other than people) which influence fashion trends.

a. ______________________________

b. ______________________________

c. ______________________________

d. ______________________________

COMPETENCY 007: Identify incoming fashion trends.

TEST ITEM 007-00-11

INSTRUCTIONS TO STUDENTS: Read each of the following statements about fashion trends and determine if each statement is true or false. Write the correct response (true or false) in the blank to the left of each statement.

__________ 1. European designers have no effect on the fashions worn by people in the United States.

__________ 2. Geographic factors play a big role in whether or not certain fashion trends are accepted for a specific area of the country.

__________ 3. Television has not had any major effect on the fashion industry.

__________ 4. Front page news stories very often influence the new fashion trend developments.

__________ 5. The "youth market" is a result of younger people being more outspoken in public.

TEST ITEM 007-00-12

INSTRUCTIONS TO THE TEACHER: Students are to identify the major fashion trends for the season (this might apply to the present or coming season). The student can use periodicals to cut and paste new trends, or they may sketch illustrations to identify those trends. Fabric swatches and pattern books are also helpful in identifying color and silhouette trends. The student should also provide a written description of factors which have perhaps influenced the season's fashion trends: colors that are dominant, hemline lengths, lapel widths, collars, necklines, silhouette outline, sleeve styles, tie widths and designs, and fabric textures and patterns or designs, waistline treatments, and accessory items. The student should also be able to identify the "fashion look" for the season. A checklist is provided for evaluating the student's work. You may wish to share a blank checklist with the students for them to use as a guide in their work.

INSTRUCTIONS TO THE STUDENT: Using a sheet of posterboard (or other materials with permission from your instructor) cut and paste illustrations to identify the fashion trends for the coming season. Either use current fashion media for cut and paste illustrations or sketch illustrations to identify the trends. Fabric swatches and pattern books may be used for illustration purposes also or use your imagination to create other ways and methods for illustrating (but secure the permission of your instructor first). A written description of the factors which have perhaps influenced the season's trends should also be developed. Trends which should be illustrated and discussed are: dominant colors, hemline lengths, lapel widths, collar designs, necklines, silhouette outlines, sleeve styles, tie widths and designs, fabric textures, waistline treatments, fabric patterns or designs, trims, accessories, and the so-called fashion trend "look" for the season.

TEST ITEM 007-00-12

## FASHION TRENDS CHECKLIST

The following will serve as a checklist for the evaluation of the students' development of illustrations and discussion of fashion trends for the present or coming season.

I. Did the student include illustrations and discussion of:

| | YES | NO |
|---|---|---|
| a. dominant colors | | |
| b. hemline lengths (pants and skirts) | | |
| c. lapel widths | | |
| d. collar designs | | |
| e. fabric textures, patterns and designs | | |
| f. waistline treatments (slacks, skirts, dresses) | | |
| g. sleeve styling | | |
| h. accessories (hats, belts, bags, gloves, jewelry, etc.) | | |
| i. silhouette outlines | | |
| j. trims | | |
| k. "fashion look" | | |
| l. other, depending on the season | | |

II. Creativity and originality in presentation.

III. Neatness of presentation.

COMPETENCY 008: **Demonstrate knowledge of the leading fashion designers**, characteristic features of their fashions, trends they are currently setting, etc.

TEST ITEM 008-00-11

INSTRUCTIONS TO STUDENTS: Read each of the following statements about fashion designers and determine if each statement is true or false. Write the correct response (true or false) in the blank to the left of each statement.

__________ 1. The "couture" designers are probably the best known designers to the fashion conscious customer.

__________ 2. Coco Chanel's greatest contribution to fashion history was her loose-jacket suit and jersey sports dress.

__________ 3. Anne Klein has probably had the greatest influence of all designers in setting the example for the American look in sportswear.

__________ 4. Mme. Vionnet created the idea of cutting the fabric in the traditional manner along the selvage in order to make it drape into a beautiful cowl neckline.

________ 5. Pierre Cardin is considered the leading couturier who designs for both sexes.

TEST ITEM 008-00-12

INSTRUCTIONS TO STUDENTS: In Column I are statements identifying designs of leading fashion designers. From the designer names in Column II, select the one which is most appropriate for each item in Column I. Record the letter of your choice in the space provided to the left.

COLUMN I

_____ 1. The first designer to create a men's wear department and to have her own perfume house.

_____ 2. Banned the corset, created the brassiere, and introduced the "hobble" skirt.

_____ 3. "Shocking pink" made her famous and "ugly chic" was her trademark.

_____ 4. In 1966, he introduced the first "nude" look.

_____ 5. His signature color is "brown".

_____ 6. "Polo" is his chosen trade name.

_____ 7. Started the "mod" look of the 50's.

_____ 8. Typical designs include the classic ultra-suede.

COLUMN II

a. Balenciaga

b. Pierre Cardin

c. Halston

d. Calvin Klein

e. Madame Jeanne Lanvin

f. Ralph Lauren

g. Paul Poiret

h. Elsa Schiaparelli

i. Mary Quant

TEST ITEM 008-00-13

INSTRUCTIONS TO STUDENTS: Read each of the following incomplete sentences. Determine which of the completion choices is most appropriate for each statement. Write the letter of this response in the space provided to the left.

_____ 1. The first short dresses in "humble" fabrics, the loose-jacket suit, and the jersey sports dress were designs of:

a. Christian Dior.
b. Captain Edward Molyneux.
c. Gabrielle "Coco" Chanel.
d. Calvin Klein.

_____ 2. The designer having the biggest single influence on clothes worn by active career women and setting the example for the American look in sportswear was:

a. Anne Klein.
b. Balenciaga.
c. Halston.
d. Calvin Klein.

_____ 3. Russian and Gypsy fashion themes, which set the pace for ethnic fashions in the 60's, were a result of designs by:

a. Anne Fogarty.
b. Hubert de Givenchy.
c. Pierre Cardin.
d. Oscar de la Renta.

_____ 4. The designer who created the "new Look" of the 40's with its natural shoulder lines, flared full skirts, fitted waistlines, and snug fitting jackets was:

a. Christian Dior.
b. Balenciaga.
c. Schiaparelli.
d. Geoffrey Beene.

_____ 5. The leading couturier designing for both male and female lines is:

a. Oleg Cassini.
b. Hubert de Givenchy.
c. Pierre Cardin.
d. Gucci.

## TEST ITEM KEYS

### 001-00-11

1. False
2. True
3. False
4. True
5. True

### 001-00-12

1. b
2. c
3. b
4. d
5. a

### 001-00-13

1. e
2. f
3. g
4. a
5. h
6. c
7. d
8. b

### 002-00-11

1. False
2. True
3. True
4. True
5. True

### 002-00-12

1. g
2. f
3. a
4. c
5. e
6. d

### 002-00-13

1. 70's -- casual living, more leisure time
2. 20's -- Emancipation and the desire to appear more masculine
3. 40's -- the war and the law limiting the yardage of fabric to be used in clothing
4. 30's -- royal honeymoon of England's king and the trip to Tyrol
5. 70's -- women were confused about lengths of hemlines since they were refusing to wear the midi

### 003-00-11

1. True
2. False
3. True
4. True
5. False

### 003-00-12

| | | | |
|---|---|---|---|
| Step 1 | Introduction | - | Highest prices |
| Step 2 | Rise | - | High prices |
| Step 3 | Mass Sales | - | Popular prices |
| Step 4 | Decline | - | Discount prices |
| Step 5 | Obsolescence or Abandonment | - | Half-price or below |

### 003-00-13

1. a
2. e
3. b
4. d
5. c

### 004-00-11

1. False
2. True
3. True
4. True
5. True

### 005-00-11

| | | |
|---|---|---|
| 1. | Women's Wear | Trade |
| 2. | Men's Wear | Trade |
| 3. | Gentlemen's Quarterly | Consumer |
| 4. | Glamour | Consumer |
| 5. | Seventeen | Consumer |
| 6. | Mademoiselle | Consumer |
| 7. | L'Officiel | Consumer |
| 8. | Vogue | Consumer |
| 9. | Bazaar | Consumer |
| 10. | Esquire | Consumer |

### 005-00-12

1. False
2. True
3. False
4. True
5. True

### 005-00-13

1. college and young adult market
2. older readers with more money
3. older readers with more money
4. teenage market
5. older readers with more money
6. older readers with more money
7. college and young adult market

### 006-00-11

I. A fashion trend is the direction in which fashion is moving.

II. Student answers will vary. The following responses may be used as a guideline:

  A. Political leaders
  B. Royalty
  C. Theatrical personalities
  D. Fashion models
  E. "Jet set" fashion leaders
  F. Designers

III. Student answers will vary. The following responses may be used as a guideline:

  A. Dominant events
  B. Changes in ideas (morals, art, concepts of beauty)
  C. Shifts in population distribution
  D. Foreign influence
  E. State of economy
  F. New fabrics and textures
  G. Television

### 007-00-11

1. False
2. True
3. False
4. True
5. False

### 007-00-12

The students' work will vary in their development of the fashion trends. The following items may be used as a guideline in evaluating the students work. A checklist is also provided, but you will need to assign point values to each item.

1. Trends to be illustrated and discussed:
    - a. dominant colors
    - b. hemline lengths
    - c. lapel widths
    - d. collar designs
    - e. fabric textures, patterns and designs
    - f. waistline treatments
    - g. sleeve styling
    - h. accessories
    - i. silhouette outlines
    - j. trims
    - k. "fashion look"
    - l. other--depends on the season
2. Student's creativity and originality
3. Neatness

008-00-11

1. True
2. True
3. True
4. False
5. True

008-00-12

1. e
2. g
3. h
4. b
5. d
6. f
7. i
8. c

008-00-13

1. c
2. a
3. d
4. a
5. c

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# COMMUNICATIONS

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| COMPETENCY STATEMENT | 7271 | C | S | CO |
|---|---|---|---|---|
| I. Elements of Communication | | | | |
| II. Levels of Communication in Business | | | | |
| A. Vertical | | | | |
| B. Horizontal | | | | |
| C. Formal | | | | |
| D. Informal | | | | |
| III. Ways of Communicating | | | | |
| A. Speaking | | | | |
| 010 Communicate verbally with customers, employees, supervisors, and others.<br>The student will attain an appreciation of proper enunciation of words and discover that the tone of a voice can communicate sincerity and an eagerness to be of service.<br>Using a role-playing situation, the student will communicate verbally with a customer over the telephone in a businesslike manner. | X | | | X |
| 011 Use the telephone correctly and courteously.<br>The student will identify qualities that make up a good telephone voice.<br>The student will demonstrate use of the telephone correctly and courteously. | X | X | | |
| 012 Demonstrate knowledge of how to address other people in a businesslike manner including customers, fellow employees, supervisors, and management personnel.<br>The student will identify proper terms and procedures to use in addressing others.<br>Using a role-playing situation, the student will address a customer in a businesslike manner in a telephone conversation. | X | X | | |
| B. Listening and Observing | | | | |
| 013 Listen attentively to directions, assignments, and information from customers, supervisors, or managers.<br>The student will list information about listening and observing in business situations.<br>After listening to information read orally, the student will recall specific facts.<br>Using a role-playing situation, the student will demonstrate attentive listening by following a customer's request to leave a memo.<br>Using a role-playing situation, the student will determine a customer's needs for certain product information by listening and asking questions. | X | X | | |
| C. Writing | | | | |
| 014 Use legible handwriting in preparing forms, messages, and records.<br>The student will identify correct statements concerning the use of legible handwriting in business.<br>Given the appropriate information, the student will complete a sales ticket legibly and correctly.<br>Using a role-playing situation, the student will legibly complete a memo from information obtained over the telephone. | X | X | | |

| COMPETENCY STATEMENT | 7271 | C | S | CO |
|---|---|---|---|---|
| 015 Compose and complete correspondence, reports, and forms.<br>The student will identify correct terms to use in correspondence.<br>Given appropriate information, the student will rewrite a memo to make it clear and concise.<br>Using a role-playing situation, the student will compose a memo from the information obtained over the phone. | X |  | X |  |
| D. Reading |  |  |  |  |
| 016 Read and utilize information from reports, forms, policies, product information, graphs, tables or charts.<br>The student will read a product information sheet and advertisement effectively so as to relate this information to customer benefits.<br>The student will identify types and degrees of reading for various business needs.<br>Given a tax chart, the student will read and interpret appropriate information. | X |  | X |  |
| E. Communicating Through Body Language |  |  |  |  |

PLANNING NOTES

I. Elements of Communication

A. **Sender:** person who sends the message.

B. Receiver: person who receives the message.

C. Message: what is communicated.

D. Medium: method used to transmit communication.

E. **Feedback:** positive or negative signals sent back to the sender by the receiver.

II. Levels of Communication in Business

A. Vertical: communications between people in a business with different levels of authority.

1. Upward: communication from an employee to an employer or manager. (TM-1)

Examples: Vacation and work schedule changes;
Required routine business reports (i.e. daily sales);
Assistance with problems or unusual situations;
Suggestions for changes in the business;
Feelings about the business.

2. Downward: communication from an employer or manager to an employee. (TM-2)

Examples: Job descriptions or instructions;
Job rationale;
Business policies, procedures, rules, benefits;
Overall business goals;
Employee evaluations.

B. Horizontal: communication between people in a business with the same authority. (TM-3)

Examples: Interdepartmental memos;
Requests for data from another department.

C. Formal: communications concerning business matters.

Examples: Letters or memos;
Bills;
Orders for goods;
Vacation and work schedules.

D. Informal: communications concerning personal matters.

Examples: Dating;
Weather;
Hobbies. (SA-1)

III. Ways of Communicating (SA-2)

Ways of communicating refers more specifically to the communications medium. In many circumstances, the total communication process involves a combination of the five basic ways of communicating.

A. Speaking

1. Importance of communicating verbally with customers, employees, supervisors, and others. [CTIB 010-00-11]

a. Tone of voice, pronunciation and word selection are key elements of verbal communication. (SA-3)

b. Verbal communication is essential in many business situations.

(1) Making Introductions

(a) The honored person's (supervisor's) name is given first.
(b) A younger person is presented to the older person.
(c) A male is presented to a female.

(2) Selling Merchandise

Selling merchandise is an extension of selling oneself, therefore certain personable qualities are important:

(a) Salesperson's vocabulary;
(b) Salesperson's grammar;

PLANNING NOTES

(c) Tone of voice;
(d) Enthusiasm;
(e) Emphasis on words.

(3) Providing customer information and interpreting store policies

A store's image is reflected through its personnel. Attitudes and impressions are formed when simple contacts are made such as:

(a) Directions concerning store operation;
(b) Directions involving location of items within departments and outside the store;
(c) Inquiries concerning merchandise payment procedures such as charges, cash and checks, lay-a-aways, etc.;
(d) Policies on returns of purchases, gifts, sale merchandise, etc.

(4) Assisting or training fellow employees

(a) Explanation of store policies;
(b) Explanation of procedures used in completing a sale, stocking merchandise, operating a cash register, etc.

(5) Requesting assistance from a supervisor

(a) Responses to customers' unusual questions or problems;
(b) Enforcement of store policies.

(6) Using the telephone correctly and courteously — [CTIB 010-00-11]

(a) Customer questions concerning merchandise; — (HO-1) (SA-4) (AV-1)
(b) Calling to branch stores;
(c) Calls to customers about want slips or new merchandise;
(d) Responses to complaints or instructions on merchandise use. — (SA-5) (SA-6)

[CTIB 011-00-11]
[CTIB 011-00-12]

2. Importance of addressing other people in a businesslike manner, including customers, fellow employees, supervisors, and management personnel. — [CTIB 010-00-11]

a. Avoid using slang terms such as "hey man" with customers.
b. Avoid using terms of endearment such as "sweetie" or "dear" when assisting customers. — (SA-7)
c. "Sir" may be substituted for a man's name since it reflects an air of dignity. Do not substitute ma'am for a woman's name.
d. Address customers by name whenever possible. A person's favorite word is his/her name.
e. Address supervisors or managers formally in business situations even if you socially address them on a first name basis.

(SA-8) (SA-9)
[CTIB 012-00-11]
[CTIB 012-00-12]

B. Listening and Observing — (SA-10)

1. Why we should listen attentively to directions, assignments, and information. — [CTIB 010-00-11]

a. Receive information.
b. Receive and understand instructions.
c. Enjoy what is heard or seen.

2. How listening and observing are used in business. — (SA-11)

a. Receive instructions from management.
b. Understand job description.
c. Understand customer's desires and needs.
d. Detect shoplifters. — (HO-2)

3. Barriers to listening. — [CTIB 013-00-11] (SA-12)

a. A negative attitude towards a speaker hinders your ability to listen.

(1) Arguing mentally with speakers before they have stated their complete thoughts keeps you from hearing all of their ideas.
(2) Allowing the language of the speakers or the thoughts they express to close your mind will limit good listening.
(3) Forming strong opinions about the speakers or their topics beforehand limits good listening.

PLANNING NOTES

b. A subjective attitude, or your own opinions, while listening distorts the message.
(1) Letting your feelings get mixed up with what the speaker is saying is another way to close your mind to a message.
(2) Prejudices may cause you to arrive at incorrect conclusions.

c. A know-it-all attitude affects what a listener actually hears.

4. Good listening habits.

a. A positive attitude toward a speaker helps you listen better.
(1) Pay attention to the speaker throughout the message. Try to understand his or her points of view. Compare the speaker's view with yours - after the talk.
(2) Listen with an open mind. Ask the speaker to explain statements or words to be sure you understand correctly.
(3) Think that the speaker is on your side until he or she proves otherwise.

b. An objective attitude, or open mind, when listening helps good listening.
(1) Do not let your emotions become part of the message you are hearing. Hear the speaker's message, not what you want to hear.
(2) Control your prejudices. Again, listen with an open mind.

c. A receptive, open attitude allows you to learn something from everyone.

5. The right mental attitude in listening.

a. Helps you be more open minded about yourself and other people.
b. Allows you to accept helpful criticism.
c. Helps you learn more.

(SA-13) (SA-14)
[CTIB 013-00-12]

C. Writing

1. Importance of using legible handwriting in preparing forms, messages, and records.

[CTIB 010-00-11]

a. Most forms used by a business provide important information.
b. Some forms, messages, and records are utilized by several persons or departments.
c. Insure forms, messages, and records are always correct:
(1) Write clearly; print if your handwriting is difficult to read.
(2) Always check over written information for transposed figures and misspelled words.

[CTIB 014-00-11]
[CTIB 014-00-12]

2. Importance of composing and completing correspondence, reports, forms, and notes using businesslike manner.

a. Criteria for communication.
(1) Courteousness: sincere good manners should be used and have a "voice with a smile".
(2) Correctness: facts should be right.
(3) Concisensss: should give only necessary information.
(4) Completeness: give all information required for understanding.
(5) Clearness: should be understood easily.

(SA-15)

b. Use basic guidelines for written communications.
(1) Keep the reader's point-of-view in mind.
(2) Use the pronoun "you" and a minimum of "I's".
(3) When handwriting information, use dark ink instead of pencil unless otherwise specified.
(4) Always suggest rather than demand.
(5) Tact and good vocabulary are essential for positive results.

(HO-3) (SA-16) (HO-3a) (HO-3b)
(SA-17) (HO-3c) (SA-18)(HO-3d)
(SA-19) (HO-3e) (SA-20)

[CTIB 015-00-11]
[CTIB 015-00-12]

D. Reading

1. Importance and types of reading and uses of such.

[CTIB 010-00-11]

PLANNING NOTES

   a. Skimming is rapid reading for getting main points.

      Examples: Magazines, product information, memos.

   b. Scanning is not reading continuously but rather locating numbers, facts, key words.

      Examples: Tables, graphs, charts.

   c. Studying is to recall and understand, judge or evaluate ideas.

      Examples: Policies, reports.

(SA-22)

2. Speed of reading.

   a. Purpose of reading helps determine speed.
   b. Difficulty of the content affects speed.
   c. Familiarity with the subject builds speed.

(SA-23)
[CTIB 016-00-11]
[CTIB 016-00-12]

E. Communicating Through Body Language

Examples: Gestures, facial expression, posture.

(HO-5)(SA-24)(SA-25)(SA-26)

# STUDENT ACTIVITIES

Complete the "Communications Crossword" puzzle on page 11. SA-1

List on the board these five basic ways that we communicate: oral, listening and observing, writing, reading, body language. Have students write at least three examples under each category that they use each day at home, work, school, and social events. Discuss the examples they have chosen and emphasize those dealing with business. SA-2

**KEY**: **Suggested** examples: Oral: telephone, introductions, selling, conferences, asking questions; Listening and Observing: radio, television, movies, demonstrations, classmates suggestions, receiving instructions, customer reactions; Writing: tests, reports, application blanks, personal and business letters, taking inventory, recording sales; Reading: textbooks, magazines, newspapers, letters, memos, hang tags, labels, bills, signs, trade magazines; Body Language: posture, expressions, hand signs, quickness or slowness of walk, nervous twitches.

Have students complete activity on pages 13 - 14. SA-3

**NOTE**: Many local telephone companies provide educational personnel and services to assist schools in teaching telephone communication. Check with your local phone company in advance to schedule films, speakers, teletrainers, lesson plans, etc. If there are no such services available in your area, the telephone exercises can be conducted by either using extension phones within the school or having students face back to back during the simulations.

Have students to answer the following questions concerning telephone communication: SA-4

1. List five qualities that make up a good telephone voice.
2. Explain how a telephone call should be transferred.
3. What should you do if you get a wrong number on a long distance call?
4. In a business situation, how should you greet a caller when you answer the phone?
5. What information should be included in a message memo?

KEY:

1. Alertness, expressiveness, naturalness, pleasantness, distinctiveness.
2. Explain why the caller is being transferred, ask for the caller's number in case of disconnection, signal the switchboard operator, when the operator answers ask that the call be transferred giving the department or extension number. When the operator has enough information hang up the receiver gently.
3. Ask the person who answers what city they are in, hang up and dial "O". When the operator answers explain you have reached a wrong number on a long distance call, give the name of the city contacted and ask not to be charged.
4. Give the name of the company, department, and your name.
5. Name of the person called, name of the caller and his business, caller's phone number, the message, any action requested, date and time of the call, name of the person taking the message.

Have students complete activity on page 15. SA-5

Using a teletrainer (or simulate) you and a partner are to role-play the following situations. Tape your conversations if a recorder is available. SA-6

1. A person is calling concerning an ad in the paper for a job as a salesperson in the shoe department of Logan's. The personnel manager's secretary answers the phone.
2. A person is calling to see if Logan's carries Aigner products. A salesperson answers the phone.
3. A customer is calling to complain that when she opened her shoe box when she got home, she found two shoes for the left foot. A salesperson answers the phone.

List the following terms on the board. Have students write on a sheet of paper those terms which are appropriate and acceptable to be used when speaking to customers. SA-7

1. Mr. Morales
2. Sweetie
3. Madam
4. Chief
5. Pal
6. Mrs. Murenski
7. Honey
8. Miss
9. Dear
10. Bud
11. Sir
12. Sonny

KEY: 1. Mr. Morales; 3. Madam; 6 Mrs. Murenski; 8. Miss; 11. Sir.

Have students complete activity on pages 16 - 17. SA-8

Have students to role-play or give individual written solutions to the following situation: SA-9

You are working in the sportswear department of Logan's. A woman comes into the store to return a bikini that her husband bought for her. She says that she is not the bikini type and does not want the suit. It is a store policy as well as a state law that swimwear cannot be returned. The woman is furious because she has not had the suit on and because her husband paid forty dollars for it which cannot be returned. What should you do?

KEY: It is most important that you remain calm and businesslike in the fall of her fury. Explain to her that the policy of the store prevents swimwear from being returned. Also, explain to her that the state law also must be followed. If she still is not realistic, tactfully suggest that she talk with the department or store manager and offer to call this person for her.

Have students evaluate their own listening habits using the form on page 18. SA-10

Observation: This activity will involve one person from outside the immediate classroom. This person may either be a teacher or student, preferably someone unfamiliar to the students in class. Instruct your "outsider" to walk into your room and perform a short activity like writing on the board, picking up a book, etc., and then leave. After the outsider has left the room, instruct each student to write a complete description of the person (weight, height, hair, clothes, items carried, etc.). Conduct a class discussion having students compare written descriptions. Stress the importance of association in observing and remembering. SA-11

Have students complete listening profile on pages 19 - 21. SA-12

Have students complete listening evaluation on pages 22 - 25. SA-13

Choose partners, preferably someone in the class you do not know well. Compose a list of ten to fifteen questions to use in interviewing this person. Below are some suggested questions. SA-14

1. Name? Where do you live?
2. How many persons are in your family?
3. Who is one person you most admire? has helped you most?
4. What do you like most about school? least?
5. Do you work? Where? What do you do?
6. What are your favorite hobbies? would you like to learn?
7. What is your most unforgettable experience?

After everyone in the class has interviewed his partner, each person will introduce his partner to the class using the information acquired during the interview. Observe good listening techniques and practice effective verbal communication.

Collect three written communications sent to your home. Evaluate the effectiveness of these written communications using the checklist below: SA-15

1. Was the communication well-organized?
2. Did the ideas flow smoothly from opening to end?
3. Did the writer know what he wanted to say?
4. Was the communication specific?
5. Was the purpose of the communication clear?
6. Was the communication courteous?
7. Was the communication correct?
8. Was the communication clear?
9. Was the communication concise?
10. Was the communication complete?

Have students complete the memo on page 27. SA-16

You have been asked by your supervisor at work to write a report on recent trends in retailing/fashion. Using current magazines and newspapers, search the different sources and prepare a summary report on the articles you have read. SA-17

Have students verify invoice on page 29. SA-18

Have students complete register reading on page 30. SA-19

Have students complete sales check on page 32. SA-20

Have students complete activity on page 34. SA-21

Have students select an issue of two different but appropriate trade publications you have available. Instruct students to scan first to see how their particular publication is organized. Then according to the chart below, identify the number of articles that fall in the appropriate categories. Allow no more than 15 minutes for this activity. SA-22

| Category | Number of Articles |
|---|---|
| Sales Promotion (advertising, display) | |
| Product Information | |
| Career Opportunities | |
| New Items | |
| Other Main Topics | |

Next, select one main article you read in the publication above to skim. Summarize that article using the format below:

Publication _____________ Article Title ______________________________________ Date _________ Page __________

Main Ideas Covered in Article ______________________________________________________________________

Have students complete communications experiment on pages 35 - 36. SA-23

Listed below are several ideas. Express each idea by the means of gestures. Role-play with the whole class. Evaluate each: (1) Pride, (2) Humility, (3) Exhaustion, (4) Contempt, (5) Happiness. SA-24

Divide the class into three groups. Each group is to prepare a skit on one of the following topics. Present the directions two times to the class - one time just using spoken communication and the second time using gestures and motions with spoken communication. SA-25

1. How to change a tire; 2. How to tie a necktie; 3. How to umpire a ballgame.

Have individual students demonstrate in front of the class how the following feelings could be conveyed by gestures. SA-26

1. Happiness; 2. Confusion; 3. Approval; 4. Surprise; 5. Worry; 6. Doubt; 7. Enthusiasm; 8. Anger.

KEY: 1. Happiness--smile; 2. Confusion--scratching head; 3. Approval--nodding head; 4. Surprise--wide open eyes; 5. Worry--wrinkled brow; 6. Doubt--shaking of head or wrinkled brow; 7. Enthusiasm--smile with wide eyes; 8. Anger--frown, hard stare.

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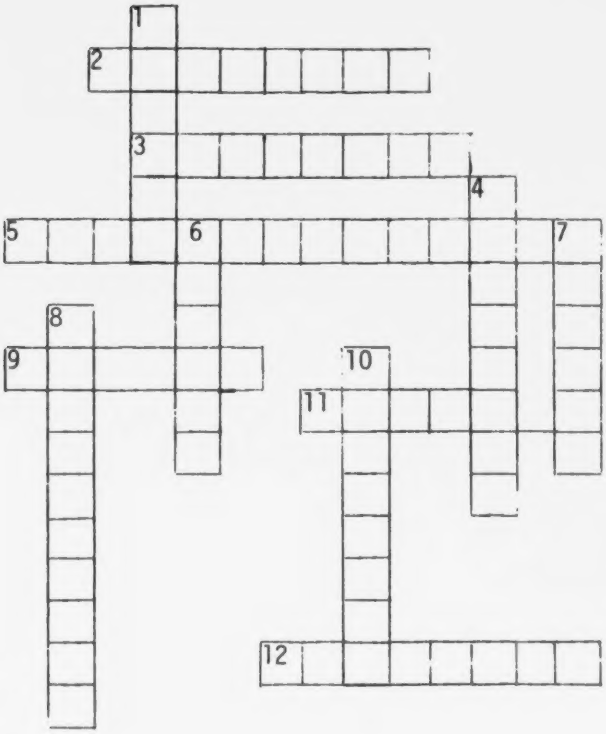
## COMMUNICATIONS CROSSWORD



DOWN:

1. Method used to transmit communication.
4. Communications from an employer or manager to an employee.
6. Examples are suggestions for business changes, assistance with problems, required routine business reports.
7. Person who sends the message
8. Communication between people in a business with the same authority.
10. Person who receives the message.

ACROSS:

2. Positive or negative signals sent back to the sender by the receiver.
3. Communications concerning personal matters.
5. The transmitting of information or messages with understanding from a sender to a receiver.
9. Communications concerning business matters.
11. What is communicated.
12. Communications between people in a business with different levels of authority.

KEY:

DOWN:

1. Medium
4. Downward
6. Upward
7. Sender
8. Horizontal
10. Receiver

ACROSS:

2. Feedback
3. Informal
5. Communications
9. Formal
11. Message
12. Vertical

## STUDENT INSTRUCTION SHEET

You will be participating in activities with other classmates designed to help you gain an appreciation of proper enunciation of words and discover that the tone of a voice can communicate sincerity and an eagerness to be of service. You will be evaluated on your participation in the small group.

### ACTIVITY 1: DIRECTIONS

A. Divide into groups of three and read all instructions for Activity 1.

B. One person will say each of the following words and phrases out loud. Do not include or omit any unnecessary sounds. (Use Lists #1, #2, and #3.

LIST #1:

1. slept
2. good
3. didn't
4. across
5. poem
6. wash
7. trip
8. library
9. quantity
10. house
11. recognize
12. county
13. promptly
14. Washington
15. depths
16. midst
17. shouldn't
18. laboratory
19. picture
20. how
21. garden
22. probably
23. mirror
24. candidate

LIST #2: (Do not use the wrong sounds for vowels or consonants.)

1. potato
2. them
3. squirrel
4. better
5. when
6. jersey
7. dirt
8. get
9. since
10. just
11. third
12. partner
13. again
14. that
15. butter
16. singing
17. bird
18. whisper
19. further
20. world
21. boils
22. water
23. such
24. fence
25. whether

LIST #3: (Tongue Twisters: Each member should practice the tongue twisters until proper enunciation is achieved to the satisfaction of the other group members.)

1. Shy Sarah saw Swiss wrist watches.
2. Six long slim slick slender slacks.
3. She stood on the balcony, mimicking him, hiccuping, and welcoming him in.
4. Freddy Finch fried five fish for Frances Fowler's father.
5. Thomas Tattertoot took taut twine to tie ten twigs to two tall trees.

C. The other two members will write on a separate piece of paper each word which was not clearly enunciated.

D. Each group member should have at least one turn reading the words.

E. When finished, give each person his/her list of poorly enunciated words.

## ACTIVITY 2: DIRECTIONS

A. Enunciation of words is important, but also important is the tone of the voice. Tone of voice often conveys meaning to the message.

B. In groups of three, each person is to think of a word, phrase, or sentence that can have different meanings depending upon the tone used when speaking.

C. Each person is to write his/her word, phrase or sentence on the top of a sheet of paper. Below this, list three different situations in which the word, phrase or sentence could convey different meanings.

D. Each person should read aloud his/her word phrase or sentence and express to other members of the group the different ways of saying it by changing the tone of one's voice.

E. Each member should attempt to identify each different meaning.

EXAMPLE: The word is "OH".

Three different situations:

1. A close friend has just lost a race.
2. A baby is being seen for the first time by the grandparents.
3. You have just had a glass of iced water after cutting the grass.

## TELEPHONE MANNERS

Courteous and efficient telephone manners are important, especially in business. Read each of the responses below and rate by circling "good," "fair," or "poor." If you rate any response fair or poor, write a brief reason why and provide a better response.

| RESPONSE | RATING | REASON | REVISION |
|---|---|---|---|
| A. "Mr. Smith isn't back yet. He's probably still at lunch. | GOOD<br>FAIR<br>POOR | | |
| B. "Yeah, this is the coat department." | GOOD<br>FAIR<br>POOR | | |
| C. "You have to pay 10% down on layaways. What's the name and address? | GOOD<br>FAIR<br>POOR | | |
| D. "All our stuff is guaranteed." | GOOD<br>FAIR<br>POOR | | |
| E. "Mrs. Hinson, I will be happy to check style 082 for you." | GOOD<br>FAIR<br>POOR | | |

KEY: These are only suggested answers. Students should indicate their reasons and give responses accordingly.

A. Fair/poor - you make it sound like Mr. Smith is taking too much time for lunch.
B. Poor - "yeah" is a slang term, it shows indifference.
C. Fair/poor - lack of courtesy is shown.
D. Poor - "stuff" indicates lack of value placed on merchandise.
E. Good.

# ADDRESSING PEOPLE IN A BUSINESSLIKE MANNER

You will be given five minutes to read and study the information below. You will then be tested on this information (orally and visually) through several true/false and identification questions.

## PRESENTATION

It is quite common in the United States for people to be friendly and informal in their business relationships. Often this means being too quick to use first names. Care should be taken to use Ms., Miss, Mrs., and Mr. when speaking to persons who are older, employers, supervisors, and even customers. Permission should be obtained before calling any of the persons by their first names.

Since the use of "sir" still maintains an air or respect, it may be substituted for a man's name. However, ma'am is not as acceptable when used in place of a woman's name. When using "yes" and "no", the name of the person you are addressing should follow and if appropriate a brief friendly statement, i.e. Yes, Mrs. Jones, I'll be glad to unpack the box.

Sometimes people feel uncomfortable about who should speak first when meeting these business people at the beginning of the day or on the street. It really makes no difference. Anyone who works with other people should always say "good morning" or "hello" to establish a friendly working relationship. However, this should be done with dignity and without familiarity.

## QUESTIONS

Based upon your reading, respond to the following questions.

A. Circle T if the statement is true and F if the statement if false.

T F 1. It is not permissible to substitute a man's name with "sir".

T F 2. You should use the name of the person you are addressing when using "yes" and "no".

T F 3. Mr. George Weber, your supervisor, has asked you to call him by his first name. You should call him George.

T F 4. When speaking to your customer Mrs. Fritz, it is best to say "Yes ma'am".

T F 5. The real problem is not who should say "good morning" first.

T F 6. Persons older than you should always be called by Mr., Miss, Ms., Mrs.

T F 7. People in the United States are very formal in their business relationships.

T F 8. Both "sir" and "ma'am" denote an air of dignity.

T F 9. Never say "good morning" first to your employer.

T F 10. You may call a person older than you or any employer by their first name if you have received permission to do so.

B. From the situations below, check those which use correct, business-like addresses.

_____ 1. Alice tells her customer, "Sir, your alterations can be picked up on Tuesday."

_____ 2. Jeff explains to his customer, "Honey, those sweaters are completely washable."

_____ 3. Steve tells his customer, "Mr. Miller, I will special order that suit for you."

_____ 4. Sarah, while waiting on a customer asks her employer a question, "Karen, can we hold these curtains until Friday?"

_____ 5. Larry explains to his customer, "Ma'am, the greeting cards are located in the stationery department."

_____ 6. Julie calls to her employer while her customer is close by, "Mr. Fields, this lady wants to know if these shoes will stretch."

KEY:

A. 1. F
2. T
3. T
4. F
5. T
6. F
7. F
8. F
9. F
10. T

B. Checked items: 1, 3, and 6 only.

# EVALUATE YOUR LISTENING HABITS

Good listening habits are expected in business. The checklist below will help you evaluate your own listening habits. Try to answer each question objectively.

| DO YOU . . . | USUALLY | SOMETIMES | NOT OFTEN |
|---|---|---|---|
| 1. Prepare yourself physically by facing the speaker and making sure you can hear? | | | |
| 2. Watch the speaker while listening? | | | |
| 3. Keep your mind on what the speaker is communicating? | | | |
| 4. Evaluate your own bias, if any and try to keep that in mind? | | | |
| 5. Listen for facts, ideas, and feelings? | | | |
| 6. Decide from the speaker's appearance and delivery whether or not what he/she has to say is worthwhile? | | | |
| 7. Interrupt immediately if you hear an incorrect statement? | | | |
| 8. Make sure before answering that you have taken in the other person's point of view. | | | |
| 9. Try to have the last word. | | | |
| 10. Make a conscious effort to evaluate the logic and credibility of what you hear? | | | |

SCORING: Questions 1, 2, 3, 4, 8, 10 : 10 points - Usually
0 points - Not Often
5 points - Sometimes

Questions 6, 7, 9 : 0 points - Usually
5 points - Sometimes
10 points - Not Often

A score of below 70 means you have developed some bad listening habits; 70-85 means your listening habits are about average; 90 or above means you are an excellent listener.

SA-12

# YOUR LISTENING PROFILE

## PART A: Your Listening Problems

This activity will help you analyze some listening problems. After reading the following questions, decide which problems you have and what you can do to improve yourself.

DIRECTIONS:

Step 1: Read each item carefully and check how often the problem affects you. Be sure to check an answer for each item.

Step 2: Decide which are your three worst problems and rate them by writing 1, 2, and 3 in the column at the right.

Step 3: Read the list of problem cures on page 20. Then choose the cure for your three worst problems.

STEP 1: HOW STATEMENTS AFFECT YOU — STEP 2: RANK

A = Always; U = Usually; S = Sometimes; N = Never

A U S N 1. Are you easily distracted by people? ______

A U S N 2. Are you easily distracted by outside noises? ______

A U S N 3. Do you look for things to distract you? ______

A U S N 4. Do you daydream in school? ______

A U S N 5. Do you daydream at home when you should be studying? ______

A U S N 6. Do you have a know-it-all attitude when people try to explain something to you? ______

A U S N 7. Are you able to remember what you have heard? ______

A U S N 8. Do you form your opinion about people or their subject before you hear them speak. ______

A U S N 9. Are you accused by others of taking things the wrong way? ______

A U S N 10. If you are part of a group that is criticized, do you think the criticism is meant for you alone? ______

A U S N 11. Do you let your prejudices keep you from listening? ______

A U S N 12. Do you have the habit of closing your mind to people if they do not think as you think? ______

A U S N 13. Do you argue mentally with people if you don't agree with something they say? ______

A U S N 14. If you do not like a person, do you let that influence your opinion of what he or she has to say? ______

STEP 3: PRESCRIPTIONS FOR THE CURE OF LISTENING WEAKNESSES

DIRECTIONS: Read through the cures listed below and select one for each of the problems you ranked 1, 2, and 3 in Step 2.

1. Force yourself to pay attention to the speaker.
2. Pick out the main ideas from what the speaker is saying.
3. Take notes, if necessary, but do not try to get down the exact words of speaker.
4. Evaluate what the speaker is saying when your thinking process is ahead of the speaker's words.
5. Listen calmly without emotion so that you can hear what you are supposed to hear--not what you want to hear or expect to hear.
6. Be on your guard so that your prejudices do not "scramble" the message.
7. Prepare yourself to listen by opening your mind to the speaker's words.
3. Pay attention to the speaker. Do not think about how you are going to respond.
9. Listen to what the speaker is saying. Do not read your thoughts into the message.
10. Ask questions to really understand either statements or words that "rub" you the wrong way.
11. Accept the fact that everyone has a lot to learn, and determine to learn something new or interesting from each person to whom you listen.
12. Listen with the idea that the speaker is on your side until the speaker has proved otherwise.

PART B: YOUR LISTENING STRENGTHS AND ATTITUDES

This part of the activity gives you a chance to analyze your listening strengths and rate them. You will then analyze your attitudes. First, do Steps 1 and 2 as described below.

DIRECTIONS:

Step 1: Follow along as each strength is read to you. Check the space that best describes how often you show that strength.

Step 2: Identify your three strongest strengths. Rate them 1, 2, and 3 in the column to the right, according to how you feel they can help you on the job. Then write a brief sentence relating to each of your top 3 strengths, telling how each can help you get and keep a job.

Step 3: Fill out the attitudes checklist and scoring on page 21.

STEP 1: JUDING YOUR LISTENING STRENGTHS

A = Always; U = Usually; S = Sometimes; N = Never

| | | | | | STEP 2: RANK |
|---|---|---|---|---|---|
| A | U | S | N | 1. Do you try hard to pay attention? | ______ |
| A | U | S | N | 2. Do you listen with an open mind? | ______ |
| A | U | S | N | 3. Do you try to pick out the main ideas when you listen? | ______ |

A U S N 4. Do you take notes when necessary? __

A U S N 5. Do you try to see things from the speaker's point of view before disagreeing? ______

A U S N 6. Do you listen without getting emotional? ______

A U S N 7. Do you try to listen for and remember the main thought? ______

A U S N 8. When you disagree with the speaker, do you ask questions to make sure you have not misunderstood what was said? ______

A U S N 9. Is your vocabulary large enough to listen to people having different levels of education? ______

A U S N 10. Is your vocabulary large enough to talk to people having different levels of education? ______

A U S N 11. Do you try to build up your vocabulary? ______

A U S N 12. Do you look up words in the dictionary that you do not know? ______

A U S N 13. Do you listen more than you talk? ______

A U S N 14. When directions contain numbers, strange names, or difficult instructions, do you write them down? ______

STEP 3: JUDGING YOUR LISTENING ATTITUDE

A. Check your answer to each of the following questions:

A U S N 1. Do you enjoy listening?

A U S N 2. Do you find listening to others a satisfying experience?

A U S N 3. Do you think good listening habits will help you make friends and keep them?

A U S N 4. Do you think good listening habits will help you on the job?

B. To find out how your attitude rates, give yourself 3 points for each "Always" you checked, 2 points for each "Usually", and 1 point for each "Sometimes."

Number of "Always" __________ x 3 = Score: __________

Number of "Usually" __________ x 2 = Score: __________

Number of "Sometimes" __________ x 1 = Score: __________

Add to find Total Score __________

| Points in Total Score | Your Rating |
|---|---|
| 12 - 9 | Super attitude. Keep up the good work! |
| 8 - 5 | You are doing fine. |
| 4 - 2 | Attitude is not bad, but some improvement is needed. |
| 1 - 0 | Your attitude needs help! |

## LISTENING EVALUATION

NOTE TO TEACHER: Orally present to students and read one time only. They will be responsible for answering 20 multiple choice questions upon conclusion.

You are an employee of Kleindales Department Store working in the women's sportswear department, which is made up of the swim shop, maternity shop, junior shop, and the misses shop. In this department you carry swim wear, slacks, knit tops and sweaters. You have just completed your annual inventory on Tuesday, January 25. Ms. Watson, your department manager, has just given you the following instructions so you can prepare the sportswear department for the new spring season. The instructions are as follows: Empty 10 feet of sweaters from the center back wall of the swim shop for the swim wear display. The swim wear color theme will be kelly green and white. Assist the display girl, Sandra, in choosing the proper coordinating outfits for the display. These should include junior bikinis and tank suits, misses 2 piece and 1 piece swimsuits, and matching cover-ups. To the left of the display is the swim wear--to the right the basic sweaters. Work those basic sweaters back into the misses shop and fill the remaining wall space with summer goods such as tank tops, sleeveless knit tops, and shorts. While you were completing your assignment, Mrs. Stevenson, a customer, returned a short sleeved acrylic knit sweater. You recoganized the style, but you only carried the long sleeved version during Christmas. It was a Christmas gift to Mrs. Stevenson. You explained to the customer that you did not have that specific style, but you could check downstairs in Ms. Watson's office for the correct price. However, in checking the price list there was only the long sleeved style listed. The long sleeved sweater retailed for $10.00. Ms. Watson was out to lunch. But in checking similar styles you found the short sleeved normally sold for $2.00 less so you have decided to inform the customer that the short sleeved style was $8.00. You exchanged her short sleeved sweater for a $7.00 tank top and refunded her the $1.00 difference.

## LISTENING EVALUATION - QUESTIONS

NOTE TO TEACHER: Hand out answer sheets. Orally present to students and read one question at a time. Do not repeat or refer to case problem.

1. The name of the department store is:

   a. Levys b. Bloomingdales c. Kleindales d. Stienfelds.

2. Which of the following is not included in women's sportswear department:

   a. Maternity shop b. Dress shop c. Swim shop d. Junior shop.

3. Inventory was completed on:

   a. Thursday, Jan. 25
   b. Wednesday, Jan. 25
   c. Wednesday, Jan. 26
   d. Tuesday, Jan 25.

4. Ms. Watson is:

    a. the customer making a return.
    b. manager of the women's sportswear department.
    c. the store manager.
    d. the display manager.

5. To the right of the display there:

    a. are basic sweaters.
    b. is swimwear.
    c. are summer goods.
    d. is the misses department.

6. How often do you take inventory?

    a. once every 6 months
    b. once every 2 years
    c. once a year
    d. once every four months

7. You are to empty:

    a. ten feet of sweaters from the center back wall.
    b. ten feet of swimsuits from the center back wall.
    c. ten feet of sweaters from the upper back wall.
    d. ten feet of swimsuits from the swim shop display.

8. You are to work the sweaters back into:

    a. the junior shop.
    b. the maternity shop.
    c. where the swim wear used to be.
    d. the misses shop.

9. The remaining space should be filled with:

    a. spring goods.
    b. summer goods.
    c. fall goods.
    d. winter goods.

10. The color theme of the display will be:

    a. yellow, green, and white.
    b. red, white, and blue.
    c. kelly green and white.
    d. rose, green, and white.

11. The merchandise returned by Mrs. Stevenson was:

    a. a long sleeved blouse.
    b. a long sleeved sweater.
    c. a short sleeved sweater.
    d. a short sleeved blouse.

12. The material of the merchandise returned by Mrs. Stevenson was:

    a. acetate knit.
    b. polyester knit.
    c. acrylic knit.
    d. a blend of cotton and knit.

13. What was the style you carried during Christmas?

    a. long sleeved
    b. short sleeved
    c. three quarter sleeved
    d. sleeveless

14. Where did you look for the correct price of the merchandise?

    a. downstairs in the store manager's office
    b. in record keeping
    c. behind the swim shop in Ms. Watson's office
    d. downstairs in Ms. Watson's office

15. How much was the long sleeved style?

    a. $7.00 b. $8.00 c. $10.00 d. $12.00

16. Where was Ms. Watson when you were checking the price of the merchandise?

    a. It was her day off.
    b. On her break.
    c. Out to lunch.
    d. At dinner.

17. How much was the difference in price between the long and short sleeved styles?

    a. $1.00 b. $2.00 c. $7.00 d. $8.00

18. What did Mrs. Stevenson take in place of her original Christmas gift?

    a. A sweater and $1.00 refund.
    b. A tank top and $2.00 refund.
    c. A tank top and $7.00 refund.
    d. A tank top and $1.00 refund.

19. What price was the tank top?

    a. $7.00
    b. $8.00
    c. $10.00
    d. $2.00 less than the short sleeved sweater

20. The sales tax refunded was:

    a. figured only on the difference.
    b. $ .96.
    c. not mentioned in the problem.
    d. $ .48.

## EVALUATION--STUDENT ANSWER SHEET

**DIRECTIONS:** Circle the letter of the correct answer.

1. A B C D
2. A B C D
3. A B C D
4. A B C D
5. A B C D
6. A B C D
7. A B C D
8. A B C D
9. A B C D
10. A B C D
11. A B C D
12. A B C D
13. A B C D
14. A B C D
15. A B C D
16. A B C D
17. A B C D
18. A B C D
19. A B C D
20. A B C D

SA-13

KEY: **EVALUATION--STUDENT ANSWER SHEET**

**DIRECTIONS:** Circle the letter of the correct answer.

1. A B [✓ C] D
2. A [✓ B] C D
3. A B C [✓ D]
4. A [✓ B] C D
5. [✓ A] B C D
6. A B [✓ C] D
7. [✓ A] B C D
8. A B C [✓ D]
9. A [✓ B] C D
10. A B [✓ C] D
11. A B [✓ C] D
12. A B [✓ C] D
13. [✓ A] B C D
14. A B C [✓ D]
15. A B [✓ C] D
16. A B [✓ C] D
17. A [✓ B] C D
18. A B C [✓ D]
19. [✓ A] B C D
20. A B [✓ C] D

SA-16

## COMPLETING A MEMO

Your telephone rings while your manager, Mr. Pioneer, is out of the store. The call is from an important customer, Mrs. Bradford. She is upset because she has not received a special order of 12 white blouses for cheerleaders she supervises at high school. The first ballgame is next Friday, and Mr. Pioneer assured her they would arrive in plenty of time for the first game. She would like Mr. Pioneer to call her concerning the blouses. He has her number on file.

Fill out the message form below completely and legibly. Use today's date.

TO ____________________

DATE ____________ TIME ____________

### WHILE YOU WERE OUT

M ____________________

OF ____________________

PHONE ____________________

| | | | |
|---|---|---|---|
| TELEPHONED | ☐ | PLEASE CALL | ☐ |
| CALLED TO SEE YOU | ☐ | WILL CALL AGAIN | ☐ |
| WANTS TO SEE YOU | ☐ | RUSH | ☐ |

MESSAGE: ____________________

____________________

____________________

____________________

____________________

____________________

____________________

____________________
Message Taken By

SA-16

KEY:

TO Mr. Pioneer

DATE Today's Date TIME

## WHILE YOU WERE OUT

M rs. Bradford

OF High School

PHONE On File

| | | | |
|---|---|---|---|
| TELEPHONED | X | PLEASE CALL | X |
| CALLED TO SEE YOU | | WILL CALL AGAIN | |
| WANTS TO SEE YOU | | RUSH | |

MESSAGE: 12 blouses she ordered are not in;
need them by next Friday

Student's Initials
Message Taken By

## EVALUATION: INVOICE

Verify the calculations on the following invoice. Determine the total discount and the net amount. Record both in the spaces provided.

XYZ LEATHER COMPANY

125 E. Main Street
Charlotte, N.C. 28211

SOLD TO: The Shoppe
13 Pasa Verde Road
Dallas, Texas 77023

April 2, 1982

TERMS: 2/10, n/30

| QUANTITY | DESCRIPTION | PRICE | TOTAL |
|---|---|---|---|
| 6 1/2 doz. | Strap-O-Matic Brief Cases | $19.15 each | |
| 5 | Matched Fitting cases | 13.50 each | |
| 1 1/2 doz. | 4-Pocket Brief Cases | 21.25 each | |
| 1 doz. | Embossed Billfolds (Brown) | 2.75 each | |
| 1 doz. | Embossed Billfolds (Black) | 2.75 each | |

| | |
|---|---|
| Gross Amount | ________ |
| Less 10% Discount | ________ |
| Net Amount | ________ |

KEY:

| | | | | |
|---|---|---|---|---|
| 6 1/2 doz. | -- | Brief Cases | -- 19.15 ea. - | $1,493.70 |
| 5 | -- | Matched Fitting Cases | -- 13.50 ea. - | 67.50 |
| 1 1/2 doz. | -- | 4-Pocket Brief Cases | -- 21.25 ea. - | 382.50 |
| 1 doz. | -- | Billfolds (Brown) | -- 2.75 ea. - | 33.00 |
| 1 doz. | -- | Billfolds (Black) | -- 2.75 ea. - | 33.00 |

| | |
|---|---|
| Gross Amount | $2,009.70 |
| Less 10% Discount | 200.97 |
| Net Amount | $1,808.73 |

## EVALUATION--REGISTER READINGS

### INSTRUCTIONS

Use the information given to complete the following register readings:

1. Write clearly
2. Use today's date
3. Be certain all necessary information is recorded

This information was taken from register #98 in Junior Sportswear.

At 12 p.m., there were 30 transactions, $33.15 in returns, $533.15 in merchandise sales.

At 3 p.m., there were 51 transactions, $1536.28 in merchandise sales, and $98.96 in returns.

At 6 p.m., there were 62 transactions, $136.76 in returns and $2001.21 in merchandise sales.

At 9 p.m., there were 101 transactions, $155.49 in returns, and $3049.98 in merchandise sales.

Complete the following form:

REGISTER READINGS

REGISTER # ______________________ DATE ____________________

SELLING AREA __________________________________________

| Time | Transactions | Mdse. Sales | Returns | Net sales | Initials |
|---|---|---|---|---|---|
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

SA-19

KEY:

REGISTER READINGS

REGISTER # 98 DATE Today's Date

SELLING AREA Junior Sportswear

| Time | Transactions | Mdse. Sales | Returns | Net Sales | Initials |
|---|---|---|---|---|---|
| | | | | | |
| 12 | 30 | 533.15 | 33.15 | 500.00 | J.W. |
| 3 | 51 | 1536.28 | 98.96 | 1437.32 | J.W. |
| 6 | 62 | 2001.21 | 136.76 | 1486.45 | S.R. |
| 9 | 101 | 3049.98 | 155.49 | 2894.49 | S.R. |
| | | | | | |
| | | | | | |

## EVALUATION--SALES CHECK

INSTRUCTIONS: Run off four copies of the sales check provided.

Use the information given to complete the following sales checks:

1. write clearly
2. double check your arithmetic
3. use today's date
4. add 5% sales tax to the bill
5. be certain all necessary information is recorded

1. Ms. Susan Stolz purchased two pairs of slacks, 1 black for $8.99 and 1 brown for $9.76. Her home address is 1342 E. Pleasant Lane, Charlotte, N.C. 28205.

2. Mr. Jeff Owens of 228 Treetop Avenue, Washington, D.C. 18540 charged 3 shirts marked 3 for $8.99, two ties at $3.99 each and four pairs of socks at $.79 each.

3. Mrs. Harold Ranniger of 1600 North Bay Avenue, Louisville, Kentucky, 19901 selected one dress at $29.50, one pair of shoes for $34.50 and one necklace for $11.95.

4. Mr. Tony Lewall telephoned the following order to be delivered to his home address of 2351 Branding Iron Loop, Tempe, Arizona, 85175: 1 box of hooks $2.00 each, 3 spools of tackle $1.49 each, 1 fishing reel $19.95, 1 fishing rod $8.75. It will be paid for at the time of the delivery.

KEY:

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| 1. | 8.99 | 2. | 8.99 | 3. | 29.50 | 4. | 2.00 |
| | 9.76 | | 7.98 | | 34.50 | | 4.47 |
| | 18.75 | | 3.16 | | 11.95 | | 11.95 |
| | .94 Tax | | 20.13 | | 75.95 | | 8.75 |
| | $19.69 | | 1.01 Tax | | 3.80 Tax | | 35.17 |
| | | | $21.14 | | $79.75 | | 1.76 Tax |
| | | | | | | | $36.93 |

SA-20

## SALES CHECK

Send To

Address

Delivery Instructions

| Date | Salesperson | Department | Charge | Cash | Check | COD |
|---|---|---|---|---|---|---|
| | | | | | | |

Charge To

Address

City-State

| Quantity | Description | Amount |
|---|---|---|
| | | |
| | | |
| | | |
| | | |
| | | |

Subtotal

Tax

Total

Customer's Signature

# FOLLOWING DIRECTIONS

INSTRUCTIONS TO STUDENTS: Read and complete the following tasks.

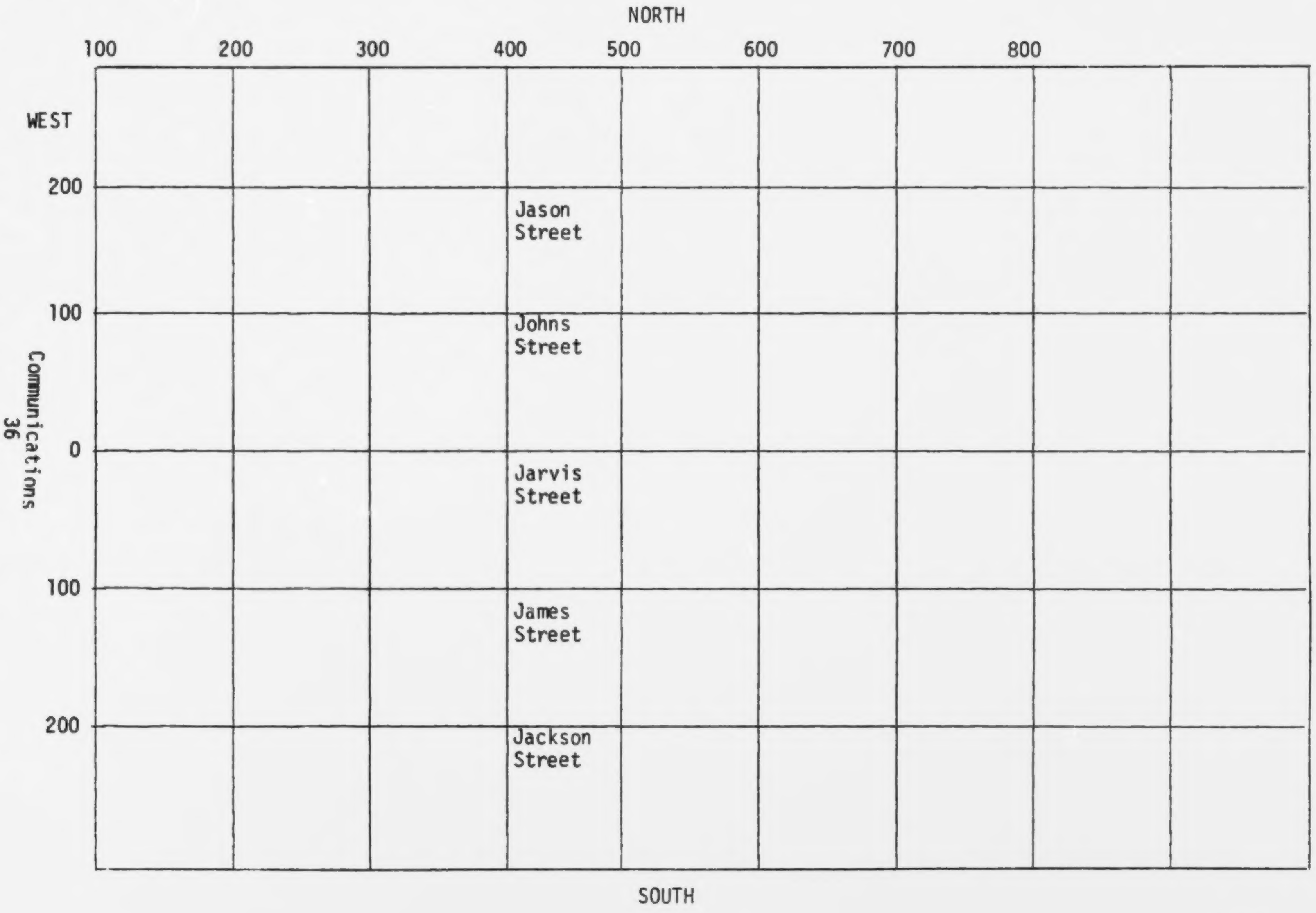
1. On a sheet of notebook paper, write your name in the upper right hand corner.
2. Read the remaining directions before doing anything.
3. Number from 1 to 10 leaving a blank line between each number.
4. On line 1 write the name of your teacher.
5. On line 2 write the name of the course you are taking.
6. On line 3 write the name of one person who is in the class with you.
7. On line 4 write the grade you are in.
8. On line 5 write the number of people in the room with you.
9. Multiply the answer beside number 5 by your age. Put the answer beside Number 6.
10. On line 7 write your address.
11. On line 8 write the name of the city in which you were born.
12. On line 9 write today's date.
13. On line 10 write your birthday.
14. Omit all directions except the first two.

# COMMUNICATION EXPERIMENT

Read and utilize the following information.

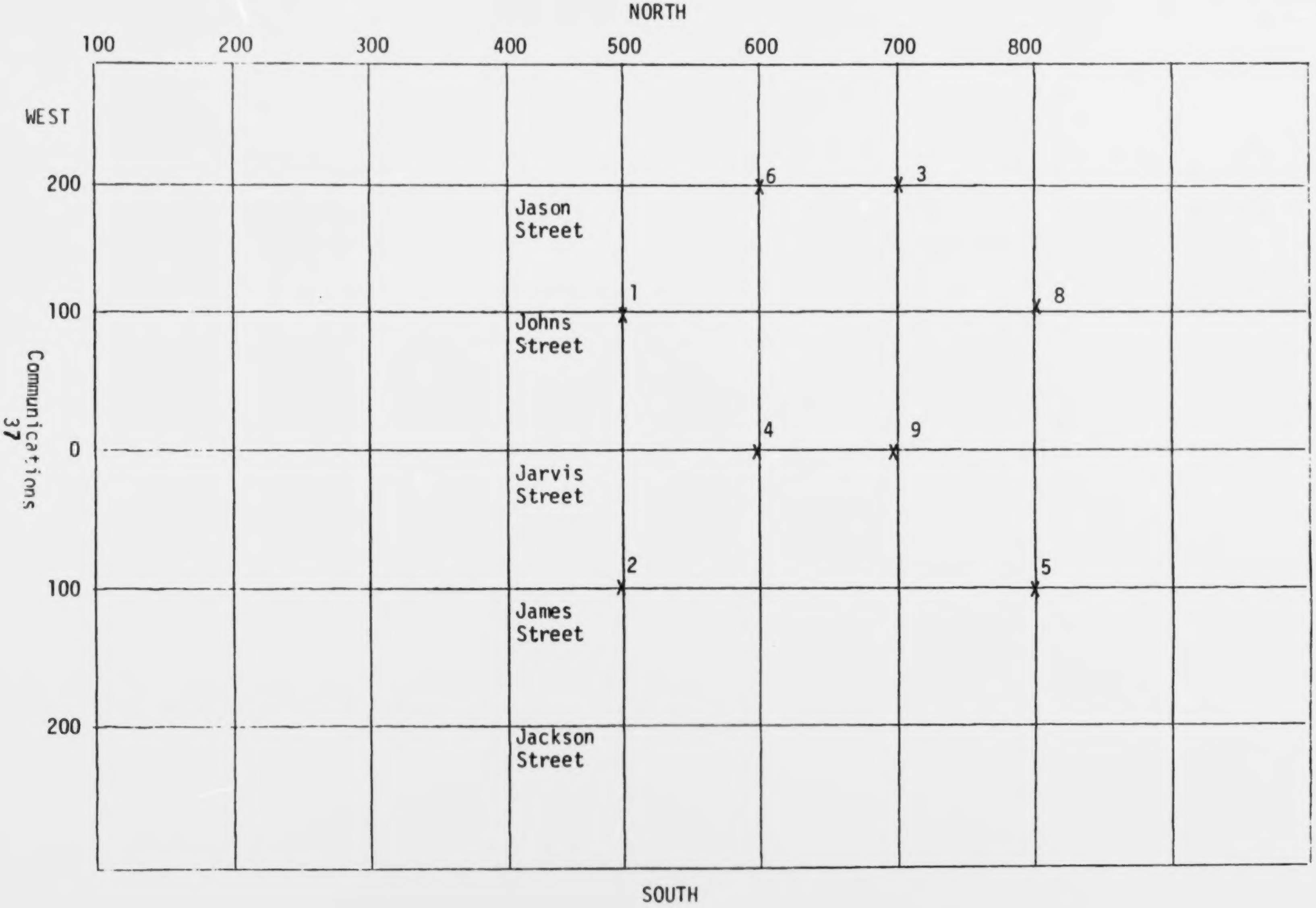
NOTE: Using the map that accompanies this sheet, follow the instructions given below. Place each X exactly over the intersections of the streets and proceed with each successive instruction by starting from the last X you wrote, except in the instances where you are instructed otherwise. Number each X as you write it. When you write an X let it stand, and make no erasures. You are competing with the other members present. When you have completed the ten instructions, fold your sheet and keep it folded.

1. Place an X at the corner of Johns and 5th Streets.
2. Walk two blocks east, three blocks south, two blocks west, one block north and place an X at the corner where you arrive.
3. Walk one block east, three blocks north, one block east and place an X at the corner where you arrive.
4. Walk five blocks south, two blocks west, three blocks north, one block east and place an X at the corner where you arrive.
5. Walk three blocks west, one block south, five blocks east, and place an X at the corner where you arrive.
6. Walk one block east, three blocks west, three blocks north, and place an X at the corner where you arrive.
7. Place another X as far from the west and south borders of the map as your last X is from the west and north borders of the map.
8. Start north, zig-zag north and east, alternating one block at a time and walking five blocks in all, then place an X at the corner where you arrive.
9. Start at the opposite corner of the block southeast of where you placed the last X, walk two blocks west and place an X at the corner where you arrive.
10. Go three-fourths of the way around a square that has the length of two blocks on each side, starting where you placed the last X and ending south of your starting point. Place an X at the corner where you arrive.


NORTH
100
200
300
400
500
600
700
800
WEST
200
100
0
100
200
Jason Street
Johns Street
Jarvis Street
James Street
Jackson Street
SOUTH

MAP FOR COMMUNICATION EXPERIMENT

SA-23


NORTH
100
200
300
400
500
600
700
800
WEST
200
100
0
100
200
SOUTH
Jason Street
Johns Street
Jarvis Street
James Street
Jackson Street
1
2
3
4
5
6
8
9

KEY:

MAP FOR COMMUNICATION EXPERIMENT

SA-23

Unit II - Communications

HO-1 Introduction to the Use of the Telephone - IDECC, Communications LAPS 8 & 9
HO-2 Basic Rules of Listening
HO-3 Written Communication - 3A through 3E refer to different types of written communications.
  3A Memorandum - Obtain a copy of a memo, explain the purposes and how it differs from a letter.
  3B Report Writing - Define report writing and explain uses.
  3C Invoice - Refer to the Personal Selling Unit.
  3D Register Readings - Using a cash register, explain register readings to students.
  3E Sales Checks - Refer to the Personal Selling Unit.
HO-5 Body Language

TM-1 Upward Communication
TM-2 Downward Communication
TM-3 Horizontal Communication

# INTRODUCTION TO THE USE OF THE TELEPHONE

Modern business could not exist without the telephone; in fact, both American business and social life are dominated by the use of the telephone.

When you answer or place a telephone call in a business office, YOU ARE THE COMPANY to the person at the other end of the line.

The telephone is an extension of your business and frequently a phone conversation is as important as any face-to-face contact with customers. In many cases, it will be the only opportunity you have to convey your personality and the personality of your company.

Naturally, the person with whom you are speaking can't see your smile or your expressions. You must rely entirely on your voice and telephone personality to demonstrate that your company is friendly and a pleasant place to do business.

Therefore, it is vital that each of us develops and understands the powers of effective telephone communications. For if your voice sounds warm and interested, you win friends and customers for your company. This is highly important to your company--and equally important to your personal business success.

# BASIC RULES OF LISTENING

Anyone can train himself to be a better listener. Perhaps the greatest barrier to better listening is the attitude of the listener. Most people consider themselves good listeners, and frequently are. However, even the best listeners could be still better if they are willing to admit that there is room for improvement. Active listening is a skill: it involves using the mind. There are certain techniques that should be learned and practiced until they become automatic.

Listed below are some basic rules that can help a listener get the most out of any spoken communication.

## Prepare to listen

Get ready to listen both physically and mentally. Physical conditions can affect the effectiveness of listening. Be in the best possible physical position to hear and concentrate. Mental preparation begins when one concentrates on the subject to be discussed.

## Have an open mind

Prejudice and bias are two major blocks to effective listening. Prejudice is an automatic reaction either strongly for or strongly against the subject that is not based on reason or logical evidence. If the listener lets his own opinion "tune out" what the speaker is saying, he may miss important information that would make him change his own opinion. How a speaker looks and how he sounds can also create a prejudice in the listener's mind, blocking his ability to hear actively.

## Listen carefully

Most speeches are based on some kind of outline. To get the full meaning of what is said, the listener should recreate that outline in his mind or in his notes. The listener should note each major point. He should not jump to conclusions that the speaker has not yet made but, instead, follow the thread of discussion and description and keep his mind on the point the speaker is making now.

## Listen with empathy

A listener should have a certain amount of empathy for the speaker. Empathy is a sympathetic understanding of another person's feelings. A degree of empathy allows a listener to listen to what is being discussed from the speaker's point of view.

HO-3

## WRITTEN COMMUNICATION

An entire business organization can be judged by one single written communication. Its impression is as lasting as that of a photograph. The most important part of that impression is made by the thoughts expressed in the message and by the way they are expressed and written.

Although the purpose of written communications is to transmit a message whose meaning is clear, they reveal much about the writer's personality. The skillful writer, therefore, plans the ideas he wants to express, but also the image he wants to reveal to the reader. To accomplish this dual goal, the writer follows a three-step plan.

1. identify the purpose of the message
2. list the ideas and facts that will accomplish the purpose
3. organize the information

# BODY LANGUAGE

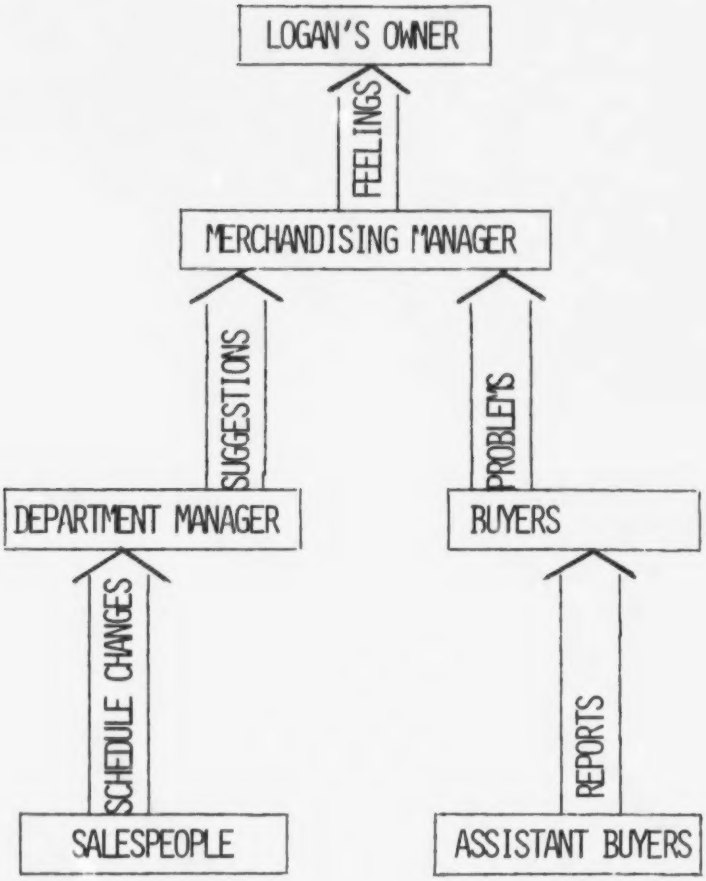
The use of body language can reinforce your feelings in communicating with others. Your gestures, facial expressions, and posture are all important techniques that can be used both positively and negatively.

Gestures are motions used to express feelings or to emphasize. Your enthusiasm can also be conveyed by your gestures. Conversely, gestures can also convey negative feelings and can be annoying to listeners. Examples of gestures that might be annoying are continuous blinking of the eyelids, hair twisting, cracking knuckles, foot tapping and biting lips.

Posture involves the way in which one carries his/her body. Good posture shows confidence, alertness, and a feeling of pride in oneself. Sloughing, stooping, slumping, and dragging ones feet are all signs of poor posture habits. Good posture conveys a positive first impression which is important in many business situations. A salesperson who displays good posture suggests to a customer a feeling of confidence.

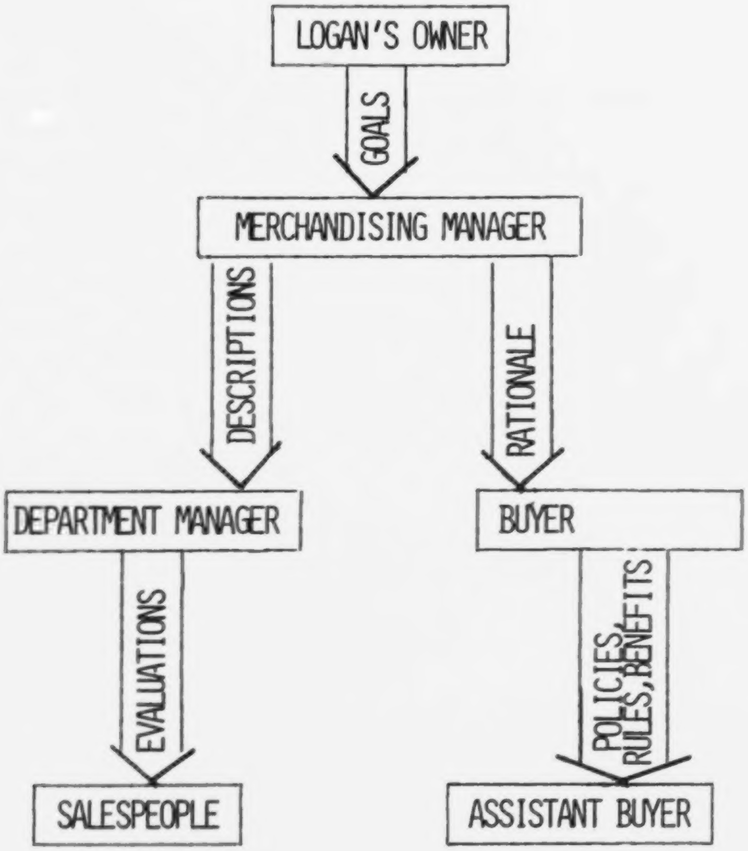
Facial expressions can say more than any words. The expression on a person's face many times will determine how another person will react to what is said or done. If a salesperson is grumpy and short, a customer will usually respond with little enthusiasm. Persons who are in a habit of smiling frequently demonstrate to others a positive, optomistic attitude about themselves and what they are doing.

# VERTICAL COMMUNICATION
## UPWARD


LOGAN'S OWNER
FEELINGS
MERCHANDISING MANAGER
SUGGESTIONS
PROBLEMS
DEPARTMENT MANAGER
BUYERS
SCHEDULE CHANGES
REPORTS
SALESPEOPLE
ASSISTANT BUYERS

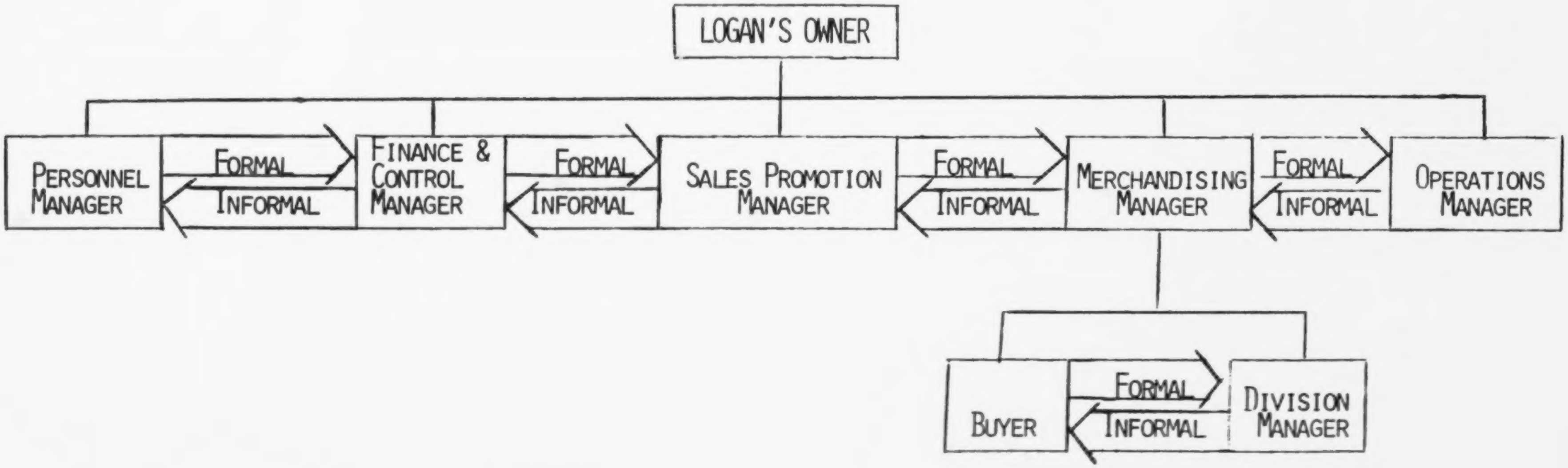
# VERTICAL COMMUNICATION

## DOWNWARD

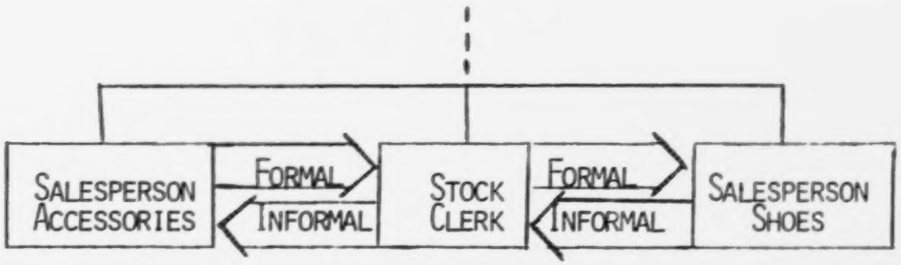

LOGAN'S OWNER
GOALS
MERCHANDISING MANAGER
DESCRIPTIONS
RATIONALE
DEPARTMENT MANAGER
BUYER
EVALUATIONS
POLICIES, RULES, BENEFITS
SALESPEOPLE
ASSISTANT BUYER

# HORIZONTAL COMMUNICATION

EXAMPLE 1


LOGAN'S OWNER
PERSONNEL MANAGER
FORMAL
INFORMAL
FINANCE & CONTROL MANAGER
FORMAL
INFORMAL
SALES PROMOTION MANAGER
FORMAL
INFORMAL
MERCHANDISING MANAGER
FORMAL
INFORMAL
OPERATIONS MANAGER
BUYER
FORMAL
INFORMAL
DIVISION MANAGER

EXAMPLE 2


SALESPERSON ACCESSORIES
FORMAL
INFORMAL
STOCK CLERK
FORMAL
INFORMAL
SALESPERSON SHOES

# EVALUATION MEASURES AND KEYS
(COMPETENCY / TEST - ITEM BANK)

## TABLE OF SPECIFICATIONS FOR TEST CONSTRUCTION

**PROGRAM AREA** Marketing and Distributive Education

**COURSE NAME** Fashion Merchandising

UNIT Communications

| Competency | EXPECTED STUDENT OUTCOME | | | | % Importance | Total No. of Items |
|---|---|---|---|---|---|---|
| | Cognitive Level* I | II | III | Performance | | |
| 010. Communicate verbally with customers, employees, supervisors, and others. | | X | | | | |
| 011. Use the telephone correctly and courteously. | | | X | X | | |
| 012. Demonstrate knowledge of how to address other people in a businesslike manner including customers, fellow employees, supervisors, and management personnel. | | | X | | | |
| 013. Listen attentively to directions, assignments, and information from customers, supervisors, or managers. | | X | | | | |
| 014. Use legible handwriting in preparing forms, messages, and records. | X | | | X | | |
| 015. Compose and complete correspondence, reports, and forms. | | | X | | | |
| 016. Read and utilize information from reports, forms, policies, product information, graphs, tables or charts. | | | X | | | |
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***LEVEL I - Recall, II - Comprehension, III - Application**

COMPETENCY 010: Communicate verbally with customers, employees, supervisors, and others.

TEST ITEM 010-00-11

INSTRUCTIONS TO STUDENTS: Using a teletrainer if available, perform a role-playing situation involving telephone skills in which you are a salesperson for Logan's. Your manager, Mrs. Brewer, is out of the store today and will return tomorrow. Mrs. Brewer has instructed you to take any calls and record any messages the callers would like to leave. You will be provided a message form.

In addition, you will be provided with a product information sheet and copy of an advertisement from today's newspaper. The customer will request information based on these handouts. You will be given five minutes to study the advertisement and product information sheet. You may refer to both sheets during the phone conversation. You should respond to the conversation and attempt to sell the product over the phone.

Your customer, Mrs. Foxcroft, has a charge account with Logan's and she can make purchases over the phone. Mrs. Foxcroft is a regular customer in addition to being a good friend of your manager. When the phone rings, it will be 11:00. Remember to use the information given for appropriate business communication.

INSTRUCTIONS TO TEACHER: Based upon your observations in previous role-playing, choose one or two or several good students to act as a customer. You may even choose another teacher, adult, or business person, depending on class size, amount of time, etc. You can test students on an individual basis or in front of the entire class, having the class evaluate along with you. An evaluation form is provided. If you choose the latter, be sure to run off enough evaluations.

You will need to pull an appropriate apparel advertisement from your local paper and duplicate for use in this role-play. Also, develop a product fact sheet for one of the products advertised.

INSTRUCTIONS TO CUSTOMER: Your name is Mrs. Foxcroft. You are good friends with the manager of Logan's, Mrs. Brewer. You will be making a phone call to Logan's to speak with the manager, Mrs. Brewer. There are two reasons for your calling.

1. You wish to talk with Mrs. Brewer concerning a fashion show that you are conducting for Logan's in conjunction with the local Women's Club on June 1. There have been complications and the date has been changed to June 8. If you are unable to speak with Mrs. Brewer have her call you at 399-4293 to confirm the change as soon as possible.
2. You saw Logan's ad for a certain product in the newspaper this morning. You are requesting more information about the product. The salesperson will respond to your questions about the product using a product data sheet and a copy of the advertisement. You will have copies of both. Study the advertisement and product information sheet. Base your questions on the data in the advertisement only. You will only use the information sheet to cross check accuracy and clarity of the information you are given by the salesperson. The salesperson is to elaborate, answer your questions clearly, convincingly and accurately using good communication skills.

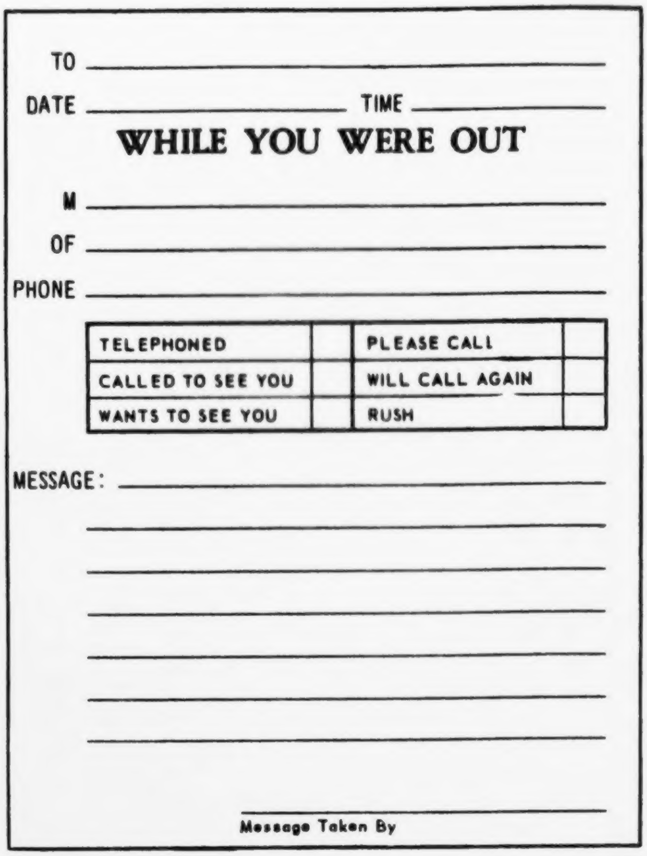
TEST ITEM 010-00-11

## EVALUATION FORM

A "yes" response is worth three points. Check appropriate blank based on performance.

| | YES (3) | NO (0) |
|---|---|---|
| **A. ANSWERING THE TELEPHONE** | | |
| I. Telephone Response | | |
| a. answered before three rings | ___ | ___ |
| b. spoke promptly and pleasantly | ___ | ___ |
| c. gave name and name of company | ___ | ___ |
| II. Telephone Conversation | | |
| a. Used clear distinct pronunciation | ___ | ___ |
| b. Used expression in voice (not monotone) | ___ | ___ |
| c. showed interest and understanding (used phrases like "I understand," "I see," "Yes, Mrs. Foxcroft) | ___ | ___ |
| d. demonstrated politeness (used phrases like "please," "thank you") | ___ | ___ |
| e. used caller's name | ___ | ___ |
| III. Close of Call | | |
| a. left pleasing impression | ___ | ___ |
| b. repeated message to verify information | ___ | ___ |
| c. allowed customer to hang up first | ___ | ___ |
| **B. LISTENING AND UNDERSTANDING INFORMATION** | | |
| I. Memo | | |
| a. listened for all information concerning fashion show | ___ | ___ |
| b. showed eagerness to listen to details and information | ___ | ___ |
| II. Sales Demonstration | | |
| a. listened to customer's needs to determine which features would become customer benefits | ___ | ___ |
| b. observed selling features from the advertisement to use in the sale | ___ | ___ |
| c. listened accurately to manager's instructions concerning incoming calls | ___ | ___ |
| **C. WRITING THE MEMO** | | |
| I. Memo | | |
| a. memo was neat | ___ | ___ |
| b. memo was legible | ___ | ___ |
| c. the overall message was clear | ___ | ___ |
| II. Specific Details of Call | | |
| a. listed caller: Mrs. Foxcroft | ___ | ___ |
| b. listed date: today's | ___ | ___ |
| c. listed time: 11:00 | ___ | ___ |
| d. made notation of who took message: student's initials | ___ | ___ |
| e. listed phone number: 399-4293 | ___ | ___ |
| f. checked blank "telephoned" | ___ | ___ |
| g. checked blank "please call" | ___ | ___ |
| h. mentioned fashion show | ___ | ___ |
| i. mentioned women's club | ___ | ___ |
| j. mentioned original and changed dates | ___ | ___ |
| k. stated reason for call being confirmed: confirm date change | ___ | ___ |
| **D. READING AND UNDERSTANDING PRODUCT INFORMATION** | | |
| I. Product Information | | |
| a. read and introduced product information accurately | ___ | ___ |
| b. interpreted product information to customer | ___ | ___ |
| c. read memo back to customer to determine accuracy | ___ | ___ |

TEST ITEM 010-00-11



TO ____________________

DATE ____________ TIME ____________

## WHILE YOU WERE OUT

M ____________________

OF ____________________

PHONE ____________________

| | | | |
|---|---|---|---|
| TELEPHONED | ☐ | PLEASE CALL | ☐ |
| CALLED TO SEE YOU | ☐ | WILL CALL AGAIN | ☐ |
| WANTS TO SEE YOU | ☐ | RUSH | ☐ |

MESSAGE: ____________________

____________________

Message Taken By

COMPETENCY 011: Use the telephone correctly and courteously.

TEST ITEM 011-00-11

INSTRUCTIONS TO STUDENTS: Read each of the following sentences. Determine which of the possible answers is most appropriate for each statement. Circle the correct choice.

1. When answering the telephone at a business, say: (Hello; Good morning, Logan's).
2. Hold the phone (near, far from) your mouth.
3. Speak into the phone so you (are heard clearly, challenge the person to listen attentively).
4. The phone should ring at least (3, 10) times before you give up and hang up.
5. The phone conversation is to be terminated by the (caller, receiver).
6. If someone calls a co-worker who is not in the store at the time, you should (remember to tell him/her, write the message down for him/her).

TEST ITEM 011-00-12

INSTRUCTIONS TO STUDENTS: Read each of the following statements about proper telephone usage. Determine if each statement is true or false. Write the correct response (True/False) in the blank to the left of each statement.

_____ 1. If you are "screening" calls for a supervisor, it is permissible to say "Who wants to speak to him?"

_____ 2. Voice and telephone personality take the place of body language over the telephone.

_____ 3. If you reach a wrong number, it will save time if you just hang up.

_____ 4. Using a caller's name frequently in a telephone conversation makes them feel uncomfortable.

_____ 5. When answering a business phone, you are the business to that caller.

TEST ITEM 011-00-13

See Test Item 010-00-11.

COMPETENCY 012: Demonstrate knowledge of how to address other people in a businesslike manner including customers, fellow employees, supervisors, and management personnel.

TEST ITEM 012-00-11

INSTRUCTIONS TO STUDENTS: Circle the number of the statements below that demonstrate knowledge of how to address other people in a businesslike manner.

1. Suzi calls to her department manager and says, "Jack, this lady wants to talk to you."
2. Jim tells his customer, "Mr. Smith, your alterations will be ready by noon."
3. John tells the store manager, "Yes sir, that shipment arrived yesterday."
4. April explains to her customer, "Honey, that color looks great on you."
5. Nancy comments as her customer walks in her department, "Mrs. Harris, we just received a new shipment of your favorite sandals in new colors."

TEST ITEM 012-00-12

INSTRUCTIONS TO STUDENTS: Read each of the following statements about proper terms to use in business. Determine if each statement is true or false. Write the correct response (True/False) in the blank to the left of each statement.

_____ 1. Terms of endearment such as "dear," "honey," or "sweetie," make the customer feel appreciated.

_____ 2. Even if one is on a first-name basis with management personnel, it is appropriate to address them formally in front of customers.

_____ 3. One should refer to a customer as "Sir" or "Ma'am" only if the customer is obviously older than the salesperson.

_____ 4. Slang terms are appropriate to use when talking with fellow employees and customers if they are your age.

_____ 5. Customers feel welcome in your store if you address them by name.

TEST ITEM 012-00-13

See Test Item 010-00-11.

COMPETENCY 013: Listen attentively to directions, assignments, and information from customers, supervisors, or managers.

TEST ITEM 013-00-11

INSTRUCTIONS TO STUDENTS: Complete the blanks below using the appropriate words or phrases.

1. List three main reasons why a person listens.

   A. ______________________________

   B. ______________________________

   C. ______________________________

2. List four ways listening and observing can be used on the job.

   A. ______________________________

   B. ______________________________

   C. ______________________________

   D. ______________________________

[illegible]. What percentage of our time do we spend listening? ____________

4. What is the greatest barrier to better listening? ____________

5. What four techniques or rules can help a listener get the most out of listening?

   A. ______________________________

   B. ______________________________

   C. ______________________________

   D. ______________________________

TEST ITEM 013-00-12

INSTRUCTIONS TO STUDENTS: Students will listen to the instructions on new policies and procedures given at a storewide meeting. They should take notes during the presentation since they are to be responsible for informing fellow employees who are absent about the policy changes.

INSTRUCTIONS TO TEACHER: Read the following "storewide meeting" to students. Allow students to ask any questions, but do not reread any parts. On a separate page, have the students write the answers to the following questions as you read them based on the information they have just heard.

## Storewide Meeting

Good afternoon. Welcome to our meeting. I have several new policies and procedures to report to you this afternoon.

First of these - A lost and found box has been placed behind the service desk on the 2nd floor. Any lost articles you find in your department should be brought here.

Second - A new dress code will be enforced beginning Wednesday. Women are not permitted to wear sleeveless garments or jeans. They should wear fashionable business attire. Pant suits are appropriate - do not wear dress pants and a blouse - the hips should be covered with a jacket or a sweater. Hemlines should be no more than 2 inches above or below the knee. Men are required to wear a suit and tie or sportscoat and tie if they are on the selling floor.

Third - Store policy prohibits any drinking or eating on the floor. Management has observed several people with soft drinks on the selling floor behind counters. If this continues, drink machines will be removed.

Fourth - We have switched to a new computer system for keeping inventory. I am passing out an example of the new tags that will be on all merchandise. Looking at your example, you will see three sections to the tag; the section labeled 001 will be torn off and placed under the sales counter in a box. Section 002 will go on a spindle beside the register and 003 will remain on the garment for the customer. At the end of the day these tags should be taken to Mr. Carter's office on the 2nd floor behind the furniture department. Be sure to demonstrate to your fellow employees so they will have no doubt how to use the new computer tags.

Are there any questions concerning the items discussed? Our meeting is adjourned.

Students may use their notes in answering the following questions.

1. Why was the meeting called?
2. What was the first procedure covered?
3. What specific location instructions were given?
4. What was the second policy covered?
5. When will it begin?
6. What is not permitted?
7. What kind of pants are permitted?
8. What was said about hemlines?
9. What should men wear on the selling floor?
10. What was the third policy covered?
11. What will be the consequences if store policy is not followed?
12. What was the fourth policy covered?
13. How many sections on the new tags?
14. What should be done initially with each section?
15. Where will these tags be taken daily?

TEST ITEM 013-00-13

See Test Item 010-00-11.

COMPETENCY 014: Use legible handwriting in preparing forms, messages, and records.

TEST ITEM 014-00-11

INSTRUCTIONS TO STUDENTS: Complete the sales ticket legibly and completely according to the information provided below.

Mr. Barrett Houston purchased a pair of gloves for his daughter, Susan's birthday. Upon requesting the purchase be charged to his account #4856, the salesperson asked Mr. Houston for his address to verify their records were up to date. After calling the credit department, they verified that Mr. Houston's correct address was listed as 4041 Ravenfield Drive, Phoenix, Arizona 45870. Mr. Houston requested that the gloves be delivered to his daughter. Susan lives at 60000 Lakeshore Drive, Los Angeles, California 54789. The gloves cost $18.00. There is 6% sales tax in Phoenix, but sales tax does not apply to merchandise mailed out of state. Logan's has a free delivery policy. Your department number is 12.

Charge To Acct. No.

Street

City State Zip

| Dept. | Quantity | Article | Amount |
|---|---|---|---|
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | Subtotal | |
| | | Tax | |
| | | Total | |

X Customer Signature

Send To

Street

City State Zip

Date Dept. Sold By:

TEST ITEM 014-00-12

INSTRUCTIONS TO STUDENTS: Read each of the following statements about legible forms, messages, and records in business. Determine if each statement is true or false. Write the correct response (True/False) in the blank to the left of each statement.

_____ 1. Most forms used by a business are just to keep personnel busy, therefore you should fill out the forms quickly.

_____ 2. Inventory sheets figures must be written clearly since they usually provide tax and reorder information.

_____ 3. Print information if your handwriting is difficult to read.

_____ 4. Always check over written information for transposed figures and misspelled words.

_____ 5. Most forms, messages, and records go strictly to one person or department.

TEST ITEM 014-00-13

See Test Item 010-00-11.

COMPETENCY 015: Compose and complete correspondence, reports, and forms.

TEST ITEM 015-00-11

INSTRUCTIONS TO STUDENTS: Rewrite the following memo, making it clear and concise.

The purpose of this memo is to acknowledge the receipt of the copy of the invoice of June 9 which we requested. We wish to take this opportunity to express our appreciation of your prompt attention to this matter. Enclosed you will find our check in the amount of $38.86 in payment of the invoice. It is with sincere apology that we send this payment after locating our mistake while referring back to our records. We assure you that we will make every effort to avoid a mistake of this nature in the future.

TEST ITEM 015-00-12

INSTRUCTIONS TO STUDENTS: Read each of the following sentences. Determine which of the possible answers is most appropriate for each sentence. Circle the correct choice.

1. We (accept, except) all national credit cards.
2. This will not (affect, effect) your job.
3. Your supervisor will be able to (advice, advise) you.
4. Apply in the (personal, personnel) department.
5. Follow the correct (procedure, preceedure) when completing sales records.

TEST ITEM 015-00-13

See Test Item 010-00-11.

**COMPETENCY 016:** Read and utilize information from reports, forms, policies, product information, graphs, tables and charts.

TEST ITEM 016-00-11

INSTRUCTIONS TO STUDENTS: Read each of the following statements concerning reading and utilizing information in business. Determine if each statement is true or false. Write the correct response (True/False) in the blank to the left of each statement.

_____ 1. All business correspondence should be read with the same intensity.

_____ 2. A salesperson should study a store's policies and procedures since he must understand a policy before he can explain it to a customer.

_____ 3. Skimming Men's Wear or Women's Wear Daily is a good way to become familiar with upcoming fashion trends.

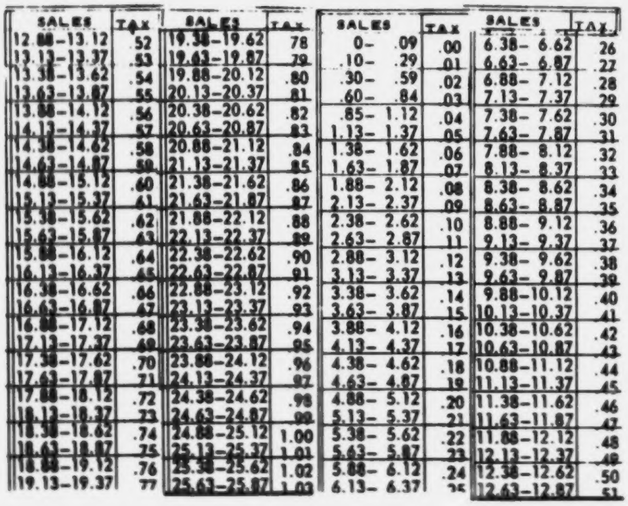
_____ 4. Tax charts can be scanned rather than read completely.

_____ 5. How fast each person reads depends on how well he was taught in school.

TEST ITEM 016-00-12

INSTRUCTIONS TO STUDENTS: Read and interpret the tax chart below. This is an example of a tax chart at the rate of 4%. If the sales price is less than 9¢, there is no tax; if the price is 10¢ to 29¢, the tax is 1¢, etc. The table below shows tax on sales up to $25.00. Using the chart, figure the tax on the amounts listed below.

| Sales Price | Tax |
|---|---|
| a. $10.28 | ____ |
| b. .06 | ____ |
| c. 15.26 | ____ |
| d. 7.49 | ____ |
| e. 23.18 | ____ |



| SALES | TAX | SALES | TAX | SALES | TAX | SALES | TAX |
|---|---|---|---|---|---|---|---|
| 12.88-13.12 | .52 | 19.38-19.62 | 78 | 0- .09 | .00 | 6.38- 6.62 | 26 |
| 13.13-13.37 | .53 | 19.63-19.87 | 79 | .10- .29 | .01 | 6.63- 6.87 | .27 |
| 13.38-13.62 | .54 | 19.88-20.12 | .80 | .30- .59 | .02 | 6.88- 7.12 | .28 |
| 13.63-13.87 | .55 | 20.13-20.37 | .81 | .60- .84 | .03 | 7.13- 7.37 | .29 |
| 13.88-14.12 | .56 | 20.38-20.62 | .82 | .85- 1.12 | .04 | 7.38- 7.62 | .30 |
| 14.13-14.37 | .57 | 20.63-20.87 | .83 | 1.13- 1.37 | .05 | 7.63- 7.87 | .31 |
| 14.38-14.62 | .58 | 20.88-21.12 | .84 | 1.38- 1.62 | .06 | 7.88- 8.12 | .32 |
| 14.63-14.87 | .59 | 21.13-21.37 | .85 | 1.63- 1.87 | .07 | 8.13- 8.37 | .33 |
| 14.88-15.12 | .60 | 21.38-21.62 | .86 | 1.88- 2.12 | .08 | 8.38- 8.62 | .34 |
| 15.13-15.37 | .61 | 21.63-21.87 | .87 | 2.13- 2.37 | .09 | 8.63- 8.87 | .35 |
| 15.38-15.62 | .62 | 21.88-22.12 | .88 | 2.38- 2.62 | .10 | 8.88- 9.12 | .36 |
| 15.63-15.87 | .63 | 22.13-22.37 | .89 | 2.63- 2.87 | .11 | 9.13- 9.37 | .37 |
| 15.88-16.12 | .64 | 22.38-22.62 | .90 | 2.88- 3.12 | .12 | 9.38- 9.62 | .38 |
| 16.13-16.37 | .65 | 22.63-22.87 | .91 | 3.13- 3.37 | .13 | 9.63- 9.87 | .39 |
| 16.38-16.62 | .66 | 22.88-23.12 | .92 | 3.38- 3.62 | .14 | 9.88-10.12 | .40 |
| 16.63-16.87 | .67 | 23.13-23.37 | .93 | 3.63- 3.87 | .15 | 10.13-10.37 | .41 |
| 16.88-17.12 | .68 | 23.38-23.62 | .94 | 3.88- 4.12 | .16 | 10.38-10.62 | .42 |
| 17.13-17.37 | .69 | 23.63-23.87 | .95 | 4.13- 4.37 | .17 | 10.63-10.87 | .43 |
| 17.38-17.62 | .70 | 23.88-24.12 | .96 | 4.38- 4.62 | .18 | 10.88-11.12 | .44 |
| 17.63-17.87 | .71 | 24.13-24.37 | .97 | 4.63- 4.87 | .19 | 11.13-11.37 | .45 |
| 17.88-18.12 | .72 | 24.38-24.62 | .98 | 4.88- 5.12 | .20 | 11.38-11.62 | .46 |
| 18.13-18.37 | .73 | 24.63-24.87 | .99 | 5.13- 5.37 | .21 | 11.63-11.87 | .47 |
| 18.38-18.62 | .74 | 24.88-25.12 | 1.00 | 5.38- 5.62 | .22 | 11.88-12.12 | .48 |
| 18.63-18.87 | .75 | 25.13-25.37 | 1.01 | 5.63- 5.87 | .23 | 12.13-12.37 | .49 |
| 18.88-19.12 | .76 | 25.38-25.62 | 1.02 | 5.88- 6.12 | .24 | 12.38-12.62 | .50 |
| 19.13-19.37 | 77 | 25.63-25.87 | 1.03 | 6.13- 6.37 | 25 | 12.63-12.87 | .51 |

TEST ITEM 016-00-13

See Test Item 010-00-11.

010-00-11

Rating will vary. Student should reach a proficiency score of 66 out of a possible score of 99.

011-00-11

1. good morning, Logan's
2. near
3. are heard clearly
4. 10
5. caller
6. write the message down for them

011-00-12

1. False
2. True
3. False
4. False
5. True

011-00-13

See key for 010-00-11.

012-00-11

Circle numbers 2, 3, 5.

012-00-12

1. False
2. True
3. False
4. False
5. True

012-00-13

See Key for 010-00-11.

013-00-11

1. to obtain information
   to receive and understand instructions
   for enjoyment
2. receive instructions from management
   understand job descriptions
   to understand customers desires and needs
   to detect shoplifters
3. 45%
4. attitude of the listener
5. prepare to listen
   have an open mind
   listen carefully
   listen with empathy

013-00-12

1. new policies and procedures
2. lost and found box
3. location behind service desk - 2nd floor
4. dress code
5. Wednesday
6. sleeveless garments or jeans
7. Pant suits - no dress pants and blouses - hips covered with a jacket or sweater
8. no more than 2" above or below the knee
9. suit or sportcoat and tie
10. prohibits eating and drinking on the selling floor
11. drink machines removed
12. new computer system for inventory
13. 3
14. 001 - torn off and put under sales counter in box
    002 - put on spindle beside register
    003 - remain on garment
15. Mr. Carter's office - 2nd floor behind the furniture department

013-00-13

See key for 010-00-11.

014-00-11

Charge To Mr. Barrett Houston Acct. No. 4 856
Street 4041 Ravenfield Drive
City Phoenix State Arizona Zip 45870

| Dept. | Quantity | Article | Amount |
|---|---|---|---|
| 12 | 1 | Gloves | 18.00 |

Subtotal 18.00
Tax 1.08
Total 19.08

X Customer Signature
Send To Susan Houston
Street 60000 Lakeshore Drive
City Los Angeles State:California Zip 54789
Date Dept. 12 Sold By:

014-00-12

1. False
2. True
3. True
4. True
5. False

014-00-13

See Key for 010-00-11.

015-00-11

Suggested Answer: "We received the invoice of June 9 and wish to thank you for your prompt reply. We have enclosed the payment of $38.86. We apologize for the mistake and hope it will not happen again."

015-00-12

1. accept
2. affect
3. advise
4. personnel
5. procedure

015-00-13

See Key for 010-00-11.

016-00-11

1. False
2. True
3. True
4. True
5. False

016-00-12

a. .41
b. .00
c. .61
d. .30
e. .93

016-00-13

See Key for 010-00-11.

BEST COPY AVAILABLE

# PRINTED REFERENCES

# PRINTED REFERENCES FOR COMMUNICATIONS

TEXT:

Eggland, Steven A. and Williams, John W. Human Relations in Business. Cincinnati: SouthWestern Publishing Company, 1977.

Mathisen, Marilyn Purol. Apparel and Accessories. New York: McGraw-Hill Book Company, 1979.

Rowe, Kenneth L. and Jimerson, Hallie C. Communications in Marketing. New York: McGraw-Hill Book Company, 1971.

Williams, John W. and Eggland, Steven A. Communicating at Work. Cincinnati: SouthWestern Publishing Company, 1979.

CONSORTIUM AND CURRICULUM LAB MATERIALS:

IDECC. The Ohio State University, 1166 Chesapeak Avenue, Columbus, Ohio, 43212.

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Marketing and Distributive Education

Fashion Merchandising - 7271
Fashion Merchandising and Management - 7272

| COMPETENCY STATEMENT | 7271 | C | S | CO |
|---|---|---|---|---|
| I. Color | | | | |
| 017 Identify basic color qualities and color terms and combine colors which are pleasing together.<br>The student will identify basic color terminology.<br>The student will label the parts of a color wheel according to color placement.<br>The student will identify at least five color schemes presented by the instructor and will create two of the seven color schemes and label them correctly according to the colors contained. | X | X | | |
| 018 Analyze specific customers to determine which apparel would be most appropriate, considering color, line, detail, pattern, and fabric texture.<br>Without references, the student will identify the most appropriate color choices for individuals with specified figure types, skin tones, or hair colors.<br>The student will design an appropriate garment for an individual with a specific figure type, height, face shape, and hair color, giving consideration to color, line, detail, pattern, and fabric texture. | X | X | | |
| II. Line | | | | |
| 019 Identify line types and purposes of line.<br>The student will explain the five purposes of line.<br>The student will list the three basic dress silhouettes in fashion.<br>The student will list the two basic types of line and describe the type of clothing each line-type suggests. | X | X | | |
| 020 Identify terminology used to describe the line and detail of apparel.<br>Given examples of specific clothing, the student will identify the line-type of each.<br>Describe the effect of each line on the body. | X | | X | |
| 021 Interpret the significance of structural and decorative design in relation to the selection and planning of fashion merchandise.<br>The student will differentiate between structural and decorative design lines and describe examples of each. | X | | | X |
| III. Texture | | | | |
| IV. Other Art Elements and Principles of Design | | | | |
| V. Textiles | | | | |
| 022 Identify basic textile fibers and weaves and describe wear and special care features.<br>The student will match fiber characteristics with the correct natural fiber.<br>The student will match weave characteristics to the appropriate weave. | X | X | | |
| 023 Translate label information into selling points.<br>The student will describe the importance of labeling information in selling.<br>When provided facts on a garment label, the student will translate fiber and weave characteristics into selling points. | X | X | | |
| 024 Inform customers of appropriate care of items of apparel and accessories.<br>In a simulated sales presentation, the student will instruct a customer on how to properly care for a newly purchased garment.<br>The student will match label instructions to appropriate care techniques.<br>The student will describe the appropriate care techniques for basic fibers. | X | X | | |

| COMPETENCY STATEMENT | 7271 | C | S | CO |
|---|---|---|---|---|
| VI. Application of Fundamentals to Apparel and Accessories Merchandising | | | | |
| 025 Recognize a complete fashion look that includes accessories such as shoes, bags, jewelry, gloves, scarves, or hats for women, and shoes, ties, jewelry, or other accessories for men.<br>The student will identify why and how accessories are important to a complete fashion look. | X | | | X |
| 026 Combine apparel and accessories to show the latest fashion trends.<br>The student will identify why it is important to combine apparel and accessories to show the latest fashion trends.<br>The student will identify current fashion trends and describe how to combine apparel and accessories items to achieve a total look. | X | X | | |
| 027 Identify fashion items that are appropriate for different occasions such as formal wear, sports events, business meetings, etc.<br>The student will coordinate an outfit for a male and female that would be appropriate for a special occasion showing skill in combining for a total look. | X | | | X |

PLANNING NOTES

I. Color - the most dramatic element of fashion design. (SA-1)(SA-2)

- A. Color as a light (or the reflection of light). (HO-1)
  - 1. White light - a mixture of color (violet, blue, green, yellow, orange and red as seen in the rainbow or prism).
  - 2. White - all colors in white light (reflected).
  - 3. Black - a mixture of all colors in white light (absorbed).
  - 4. Grey - a mixture of all colors in white light (absorbed a little bit).
- B. Major Sources of White Light and Their Effects on Apparel and Skin Tone
  - 1. The sun
    - a. The sun contains a fairly well-balanced mixture of all colored light rays.
    - b. The sun allows most objects to be seen in their "true" color.
  - 2. Incandescent lights
    - a. Incandescent lights contain more warm tones, especially red.
    - b. Incandescent lights emphasize warm tones in fabrics and skin tone.
    - c. Incandescent lights are flattering to most skin tones.
  - 3. Flourescent lights
    - a. Flourescent lights contain more blue and yellow light rays.
    - b. Flourescent lights bring out blues and yellows in fabrics and skin tones.
    - c. Flourescent lights do not flatter most people; they emphasize skin blemishes and circles under the eyes.
- C. Factors That Affect Color
  - 1. Light
    - a. Colored light on a fabric will make the fabric appear a different color than a white light on the same fabric.
    - b. Different white light sources will make fabrics appear to have a slight change in color.
    - c. It is important to match fabtics, etc., in the same light source in which they will be worn.
  - 2. Pigment (i.e. dying a yellow shirt red).
  - 3. Eye perception (i.e. some people are color blind).
  - 4. Emotions (i.e. psychological reactions to color).
  - 5. Other colors
    - a. A yellow background will make navy appear darker than a hunter green background.
    - b. As one ages, the skin and hair coloring becomes less intense; therefore harsh, bright colors and clean pastels are usually less attractive on an older person.
  - 6. Texture
    - a. Glossy surfaces reflect light in mostly one direction.
    - b. Rough surfaces reflect light in many directions.
    - c. Hence, satin material and cotton sail cloth will appear to have different values or intensities if dipped in the same pot of dye.
- D. Nomenclature of Color (PR-1; pp. 64-67) [CTIB 017-00-11]
  - 1. Hue (the name of a color, i.e. green, red, etc.).
    - a. Chromatic are vibrant hues (i.e. red, blue, etc).
    - b. Achromatic are hues without much color (i.e. grey, tan, khaki, black, white).
  - 2. Value (the lightness or darkness of a hue, i.e. the variations possible within one hue such as pink to red to maroon). (HO-2)(SA-3)
  - 3. Intensity (chroma or the brightness or the dullness of a hue, i.e. vivid vs. greyed hues).
    - a. Hues on the color wheel are at full intensity.
    - b. Hues of full intensity create dramatic effects and form interesting results if used with discretion.

PLANNING NOTES

- c. Hues of lower intensity (black and/or white added) are more subtle and easier for most people to wear.
- d. Apparel usually uses hues of low intensity in large areas with hues of high intensity used for accent.
- e. The intensity of a hue can be increased or decreased by surrounding it with another hue.
  - (1) Dark colors tend to lessen the intensity of a hue.
  - (2) Light hues tend to increase the intensity of another hue.
- f. Hues of high intensity tend to make the figure appear larger than colors of low intensity.

4. Warm colors (PR-2; pp. 4 and 4A)
   - a. Red, yellow, orange are warm colors.
   - b. You can add yellow to make any color appear warmer (i.e. yellow-green). (SA-4)
   - c. The advance feature of warm colors makes figures appear larger or heavier. (PR-2; pp. 5 and 5A)
5. Cool colors
   - a. Blues, greens, violets are cool colors.
   - b. If blue is added to any other color it will appear cooler (i.e. blue-red). (SA-4)
   - c. Cool colors recede, making figures appear smaller or thinner. (PR-2: pp. 5 and 5A)
6. Neutral colors
   - a. Black, white and grey are true neutrals.
   - b. Popular usage of this term in fashion also refers to beige, tan, cream and navy even though they are actually colors.

E. The Psychology of Color (HO-3)(SA-5)

F. The Color Wheel (HO-4)(SA-3)(PR-2; pp. 1 and 1A)
[CTIB 017-00-11]
[CTIB 017-00-12]

1. Three primary colors
   - a. Red, blue and yellow are primary colors.
   - b. Mixing primary colors creates all the other colors in the spectrum.
2. Secondary colors (SA-6)
   - a. Secondary colors are formed by mixing equal amounts of any two of the primary colors.
   - b. Green is formed by mixing equal amounts of yellow and blue.
   - c. Violet is formed by mixing equal amounts of blue and red.
   - d. Orange is formed by mixing equal amounts of red and yellow.
3. Intermediate (or tertiary) colors (SA-6)
   - a. Intermediate colors are formed by mixing equal amounts of one primary color and one secondary color.
   - b. Yellow-green is formed by mixing yellow and green.
   - c. Blue-green is formed by mixing blue and green.
   - d. Blue-violet is formed by mixing blue and violet.
   - e. Red-violet is formed by mixing red and violet.
   - f. Red-orange is formed by mixing red and orange.
   - g. Yellow-orange is formed by mixing yellow and orange.
   - h. Intermediate colors are always named by calling the primary color first.

G. Color Schemes (or harmonies) (SA-7)(HO-5)(PR-1; pp. 30-32)
(SA-3)
[CTIB 017-00-11]
[CTIB 017-00-13]
(TM-1)

1. Monochromatic (the use of only one hue).
   - a. Monochromatic schemes can be very dull (i.e. all beige) or very overwhelming (i.e. all hot pink).
   - b. You can achieve interesting and pleasing effects by varying the value, intensity of the hue chosen or textures of the fabrics.
   - c. The high intensity of a hue should be placed so as to accentuate the wearer's best features.
   - d. Achromatic hues (i.e. white or black) can be mixed into a monochromatic scheme, as they are not really colors (black, white and red is a monochromatic color scheme).
   - e. You must be careful to vary the value and intensity only---a change from blue to blue-green will appear to be mismatched.
   - f. An example of this scheme is a camel sport coat with dark brown slacks, brown shoes, white shirt and a brown tie.

PLANNING NOTES

2. Analogous (two to five colors which appear next to each other on the color wheel, i.e. yellow, yellow-green, green). (TM-2)
    a. It is easy to achieve pleasing effects because the colors seem to flow from one to the other.
    b. Striking effects can be achieved when one color dominates and values and intensities are varied.
    c. This scheme creates movement and excitement because of the vibrating effect of the adjacent hues.
    d. You should consider features of the wearer and place accent colors in appropriate places (i.e. aging customers should not wear bright accents near the neck line).
    e. An example of this scheme is a skirt with wide bands of green, blue-green, and blue.
3. Complementary (two hues which lie opposite each other on the color wheel, i.e. red and green). (TM-3)(SA-8)
    a. It is difficult to arrange these in a pleasing manner because each color serves to intensify the other.
    b. Do not use in equal amounts or intensities.
    c. Varying the value and intensity of the colors makes a much more pleasing color scheme.
    d. An example of this scheme is a pink dress trimmed with bright green or dark green.
4. Split complementary (three hues with one hue used with the colors on either side of its complement, i.e. green, red-violet, and red-orange). (TM-4)
    a. It is difficult to execute this scheme in apparel because the body is small and there are three greatly contrasting hues involved.
    b. In fashion, this scheme is seen most often in fabric patterns.
    c. An example of this scheme is a plaid of red-orange, muted green, and navy.
5. Double complementary (four hues with two hues and their complements (i.e. red, green, red-orange, and blue-green). (TM-5)
    a. This scheme is found in fabric patterns because the four colors are difficult to place on the body effectively in larger areas.
    b. An example of this scheme is a floral print of yellow-orange, pale yellow-green, pale blue-violet, and dark red-violet.
6. Triadic (three hues which lie equidistant on the color wheel, i.e. yellow, red, and blue). (TM-6)
    a. This is difficult to use because of the great contrast between hues.
    b. The use of this scheme demands caution in choice of value, intensity, and proportion of each hue used.
    c. An example of this scheme is a navy dress with the hem and collar bordered with red and yellow rickrack.
7. Achromatic (use of neutrals which lack chroma, i.e. black and white and various greys). (TM-7)
    a. This scheme can be very dramatic and sophisticated or very dull.
    b. An example of this scheme is a grey flannel suit with a white shirt, black shoes, grey hat and black and grey tie.

H. Color Effectiveness [CTIB 017-00-13]

1. Color schemes (not the only methods of combining color).
    a. Color schemes are safe, proven ways for combining colors and are good when learning to use color.
    b. Another method for combining colors is the feel (i.e. "If it looks right - use it.").
    c. Stay ready to discard old ideas and accept good innovative methods of using color.
2. Colors and a feeling of balance (i.e. small areas of brights balance a large area of dull).
3. Dominate color (unity in apparel look).
    a. Equal amounts of several hues create confusion.
    b. Emphasize one hue and use the others as accents.

4. The combination of hues.

   a. Three is the maximum (except in fabric patterns).
   b. The body is small and more colors are too confusing.
   c. The colors should vary in intensity and value.
   d. Aim for variety of hue, value, and intensity.
   e. Use soft related colors for multicolored harmonies unless a dramatic effect is needed.
   f. When using a vivid hue by itself stabilize it with darker self values or neutrals.
   g. Usually the most pleasing combination is the arrangement of hues naturally with the darkest values at the base working up to the lighter, brighter tones and tints at the top.

PLANNING NOTES

I. The Influence of Colors on the Individual

(HO-6)(SA-9)
[CTIB 018-00-12]
(SA-10)

1. Skin color (most important factor).

   a. Dark skin

      (1) The skin color is black, dark yellow-red with a decided blue cast and the hair and eyes are black.

         (a) Deep, rich, warm jewel colors are best.
         (b) Avoid all intense colors as they create too much contrast.
         (c) Avoid blacks, browns, and navy as they give no contrast.

      (2) The skin color is red-brown, with red and yellow undertones.

         (a) Use colors with greater intensity and higher values than the black skin tone.

      (3) The skin color is yellow-brown with yellow undertones.

         (a) Most hues flatter this skin tone and warm vivid colors are best.
         (b) Cream is better than white, and black and grey are improved with accents.
         (c) Yellow is one of the best colors (dark skins do not follow the rule that skin undertones should not be repeated).

      (4) The skin color is olive with a decided yellow undertone and faint traces of green.

         (a) This skin is most exotic in colors at medium value and strong chroma.
         (b) Avoid pure green and tints of most colors.
         (c) White, black, brown, and beige need warm accents to be worn successfully.

   b. White skin

      (1) The skin color is fair with pinkish or blue undertones.

         (a) Cool colors are usually preferred.
         (b) Medium tones and tints are usually best.
         (c) Avoid white (create no contrast) and black and vivid colors (create too much contrast).

      (2) The skin color is ruddy with red undertones.

         (a) Good colors are warm ones, with the exception of red.
         (b) Avoid greens (compliment of red) and reds as they force more red in to the complexion.

      (3) The skin color is sallow with yellow undertones.

         (a) Good choices of color are warm colors, with the exception of yellow.
         (b) Avoid yellow and purple as both of these hues force more yellow into the complexion.

2. Hair color (next most important factor).

(SA-9)

   a. Brunette (medium to dark brown).

      (1) Good color choices are greens, reds and yellows in hues of medium to fairly strong intensities.
      (2) Avoid taupe, pale blue and red-purple.

   b. Dark brunette (very dark brown to black).

      (1) Good color choices are warm colors from medium to vivid intensity, yellows, reds, purples, and neutrals are good choices.
      (2) Avoid intense blues, greens, yellow-greens, black and browns.

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c. Blond (light brown to honey color).
    (1) Best colors are clear cool and warm hues, in medium and high values. Pinks, pale blue, and lavender are excellent.
    (2) Avoid grey, beige, white and yellow.

d. Redhead (reddish blond to auburn).
    (1) Best colors are cool hues in medium value and intensity. Greens, blue-green and browns are excellent.
    (2) Avoid red and purple.

e. Grey
    (1) Best colors are cool hues in medium values and intensities.
    (2) Avoid grey, beige, and vivid hues.

3. Eye color (least important factor). (SA-9)

a. Brown
    (1) Orange tones accent the eyes.
    (2) Beige, blue, and blue-green are flattering.

b. Hazel
    (1) Highlight the strongest color.
    (2) Green, brown, coral, and gold should be flattering.

c. Green
    (1) Green highlights the eyes.
    (2) Greys, reds and yellow-reds will emphasize the green eyes.

d. Blue
    (1) Hues of blue are considered to be best.

4. Figure shape (SA-11)

a. Large
    (1) Wear cool colors of low value and intensity.
    (2) Dark hues are usually considered best, if highlighted with bright values and intensity.
    (3) Avoid vivid hues and high values except as accents at appropriate places (face or thin waist, etc.).
    (4) Avoid white.

b. Small
    (1) Wear warm colors of high value and intensity.
    (2) Avoid dark colors and cool colors (unless of high value and intensity).

c. Short
    (1) Wear one color.
    (2) Avoid contrasting hues.

d. Tall
    (1) Wear contrasting colors.
    (2) Avoid monochromatic effect.

5. Personality type

a. Dramatic
    (1) Vivid hues and dramatic combinations are best.
    (2) Reds, yellows, black and white are recommended.

b. Athletic
    (1) Medium values and intensities should be worn.
    (2) Earthtones, reds and greens are good.

c. Classic
    (1) Medium values and intensities should be worn.
    (2) Blues, greens and neutrals are good.

d. Romantic
    (1) Medium values and intensities should be worn.
    (2) Pastels are good.

PLANNING NOTES

- e. Gamin
  - (1) Medium values and intensities should be worn.
  - (2) Earthtones, blues, greens are good.
- f. Ingenue
  - (1) Pastels and cool colors are recommended.

6. Occasion
   - a. Formal
     - (1) Usually medium values and intensities and neutrals most appropriate.
   - b. Informal
     - (1) Vivid hues and dramatic combinations are appropriate.
     - (2) The "anything goes" philosophy is best in an informal occasion.

II. Line

- A. Purposes [CTIB 019-00-11]
  - 1. Direction
  - 2. Shape (silhouettes).
    - a. Line is very important in apparel (what is seen at a distance).
    - b. There are three basic dress silhouettes in fashion.
      - (1) The straight or tubular is used most frequently.
      - (2) The full or bouffant adds flair.
      - (3) The bustle, with back fullness, adds detail.
    - c. There are many other silhouettes or variations of the basics.
  - 3. Space
    - a. In a costume, it is the different parts that are unified into the whole.
    - b. In costume design, it is usually believed that uneven spacing (3 to 5 to 8) is most desirable.
  - 4. Connection (A belt seems to connect the bodice to the skirt.)
  - 5. Movement (A feeling of rhythm, i.e. a row of buttons leads the eye to important parts of an outfit.)
- B. Line in Clothing Design
  - 1. Basic figure types (HO-7)
    - a. The heavy or round figure has too much weight above and below the waist.
    - b. The thin figure needs to add fullness to the figure.
    - c. The narrow shoulder or small bust with full hips figure needs emphasis above the waist.
    - d. The broad shoulders or full bust with narrow hips figure needs emphasis below the waist.
    - e. The evenly proportioned figure is most desirable.
  - 2. Basic clothing (HO-8)
    - a. Straight lines suggest dignity, formality, and masculinity.
      - (1) Vertical lines suggest height and slenderness. (TM-8)
      - (2) Horizontal lines suggest width. (TM-9)
      - (3) Diagonal lines suggest activity. (TM-10)
    - b. Curved lines are soft, graceful, feminine, and informal. (TM-11)
      - (1) The full curve (s-like curve) emphasizes the body curves.
      - (2) The restrained curve is more suitable for the plump figure.
  - 3. Effect of line on body shape and size (HO-8)
    - a. Vertical lines are found in fabric designs, construction of costume, trims and fasteners.
      - (1) Vertical lines add height and carry the eye up and down.
      - (2) Vertical lines slenderize.
      - (3) There are exceptions: multiple vertical lines tend to add width because they carry the eye across the body.
        - (a) The effect is dependent upon the spacing and the background color.

(b) Closely spaced, parallel vertical lines may still lead the eye upward.
(c) As the space between the lines increases, the eye begins to measure width.
(d) Double breasted garments almost always add width because of the distance between lines.

(4) There are several modified vertical lines.

(a) The "Y" slims and adds height.
(b) The "T" slims but **cuts** height.
(c) The arrow slims, but cuts height.

b. Horiztonal lines are found most often in fabric designs and trims.

(1) Horizontal lines add width.
(2) Horizontal lines shorten.
(3) There are some exceptions.

(a) The longer the distance between a height bisecting horizontal line and the toes, the greater the illusion of height (i.e. short people look best in empire waistlines and short jackets)
(b) If widely spaced, multiple horizontal lines may add length to the body.

c. Diagonal lines are used **to add** variations to the look of a costume.

(1) Diagonal lines usually add height.
(2) Diagonal lines usually slenderize.
(3) Diagonal lines are the best lines to use when trying to camouflage poorly proportioned parts of the figure.
(4) There is the exception that a diagonal line adds width as it flattens out.

4. Kinds of design lines that make up clothing

[CTIB 021-00-11]

a. Structural lines are formed by the way the garment is constructed (pattern) and the fabric is used.

(1) Structural lines make up the neckline, sleeves, waist, hem and other seam lines.
(2) Structural lines should be related to body structure.

(a) They should improve the figure.
(b) If structural lines change the body proportion too much, the garment will appear grotesque (fashion history holds many good examples of this).

(3) Structural lines should be suited to the use and needs of the wearer (sportswear should allow freedom of movement).
(4) The style of the garment must be appropriate to the fabric.
(5) Structural lines should follow the principles of design.

b. Decorative lines are formed by applying trim or other decoration to the surface of the garment.

(1) Decorative lines can be formed by beading, braids, buttons, lace, and other trims.
(2) This is a less expensive method often used to achieve design interest.
(3) Decorative lines can be used very effectively.

(a) They should reinforce the basic structural design.
(b) They should relate in size and texture to the material of garment (i.e. nailheads on denim and sequins on satin).
(c) They should be used in limited areas (too much usually detracts).
(d) They should create an interesting color harmony with the fabric.
(e) They should relate to the size of the area that they occupy.

(4) Decorative lines are used in many ways.

(a) They are used to create or accent a pleasing center of interest.
(b) They give individuality to design which might otherwise lack distinction.
(c) They soften a severe line which is harsh or unflattering.
(d) They create a pleasing transition between two different fabrics.
(e) They conceal lack of quality in the fabric and design in inexpensive garments.

5. Effective uses of line in clothing
    a. The most important lines in a garment are the lines that outline it (the silhouette).
        (1) The straight silhouette gives an impression of slenderness.
        (2) The full silhouette appears to add pounds.
    b. The best designs use more than one kind of line but one kind should dominate.
    c. The predominate line determines where the eye travels when viewing the figure.

III. Textures

A. Examples of Textures in Fabrics and Accessories

1. Rough or Heavy
2. Smooth
3. Soft
4. Stiff
5. Sheer
6. Shiny
7. Contrasting textures
    a. Too much sameness is monotonous.
    b. Too much contrast results in confusion.

B. Effects of Textures

1. Silhouette
    a. Shiny textures that reflect light and heavy, bulky or rough textures increase size.
    b. Dull or smooth textures and medium to light weight textures tend to decrease size.
    c. Sheer textures and soft, clinging, stretchy textures (knits) reveal the silhouette and emphasize faults.
    d. Stiff textures conceal figure irregularities.
    e. Medium weight, dull surfaced textures flatter most figure types.
2. Construction of a Garment
    a. Pressed pleats and tailored garments demand firm, smooth textures.
    b. Gathers and ruffles need soft, sheer to medium weight textures.
    c. Draped patterns (such as in skirts and cowl necks) require medium weight, soft textures.
    d. Textures should be chosen for their appropriateness to a function (satin or chiffon for dressy occasions and denim or tweed for casual wear).

IV. Other Art Elements and Principles of Design

A. Other Art Elements

1. Space
    a. Space is an area where there is nothing.
    b. Space often forms the background area between shapes.
    c. Space is needed for visual relief.
    d. A design that does not provide enough space distracts and fatigues the eye.
    e. Space is achieved in design by the use of dull, neutral, or solid colors; smooth rather than bumpy texture.
2. Form
    a. Form is the shape of things.
    b. A pattern is an overall design made up of the arrangement of motifs.
    c. The motif is the individual unit of a pattern.
        (1) A geometric motif includes plaids, checks, stripes, and circles.
            (a) It can be formed with dyes before weaving.
            (b) It can be formed by dying on woven cloth.
            (c) It produces a contemporary feeling.

(2) A naturalistic (realistic) motif is one that looks exactly as it appears in nature.

(a) It looks like a photograph of the real thing.
(b) It does not show much imagination or creativity.
(c) The naturalistic treatment of subjects is most monotonous and and least popular.
(d) The motif is presented as a three-dimensional form.
(e) It is not particularly suited for apparel although it appears in fashion periodically.

(3) A stylized motif is a variation of the naturalistic motif.

(a) It is modeled after a form found in nature but allows for artist imagination, not limitation.
(b) It is two-dimensional in form.

(4) An abstract motif does not relate to anything in nature.

(a) It includes splashes of color and shape.
(b) Abstract motifs are used together to form a pleasing design.
(c) It is the most contemporary of motifs.

B. Principles of Design (Art Principles)

1. Balance - equal distribution of weight (actual or visual) from a central point or area.

a. Formal balance (symmetrical) is created when identical objects are equidistant from a center line and the objects appear to equalize each other.

(1) Examples include:

(a) A blazer has the same size pocket on each side of the center buttoning.
(b) A pair of jeans are buttoned or zipped.

(2) Formal balance is considered formal and stable.
(3) Formal balance may emphasize body irregularities as it encourages comparisons of one side of the body with the other.
(4) The design may appear too stable and therefore be boring.
(5) Interest can be added to formal balance in garments with unusual colors, textures, or accessories.

b. Informal balance is created when objects arranged on either side of a center are equal in weight or mass but not identical.

(1) Examples include:

(a) A shirt closes on the side.
(b) A one-shoulder dress design is balanced by bracelets on the naked arm.

(2) Informal balance creates an impression of casualness.
(3) It provides visual impact rather than exact physical weight distribution.
(4) Informal balance can be used to correct appearance of body irregularities.
(5) It allows more freedom of expression.
(6) Informal balance is difficult to use because of the many variations.
(7) Informal balance is generally more expensive and difficult to construct than informal balance.

2. Proportion - how one object relates to another. It is concerned with the relation of the size of the parts to the whole and to each other.

a. Objects are more pleasing to the eye if they are somewhat different in size.
b. The most pleasing relationship for proportion is when things have a 2 to 3 ratio or a 3 to 5 ratio or a 5 to 8 ratio.
c. The Golden Mean relationship is used in clothing design when garments are divided visually into 3 to 5, 5 to 8, 8 to 13 horizontal sections.

(TM-15)

3. Emphasis - dominance in one area of a design that a viewer sees as the center of attention (focal point).
    a. Emphasis should not be in an area that needs to be minimized.
    b. The focal point should be placed at the flattering points and draw attention away from bad points.
    c. The face or personality area should be emphasized most often.
    d. Emphasis can be achieved by repetition, unusual lines, shapes, or textures, and use of contrast with color, line, shape, or texture.
    e. Only one item should dominate - more than one focal point is confusing and takes away from the design.
4. Rhythm - organized movement that gives continuity to a design.
    a. Rhythm provides transition from one unit to another.
    b. It leads the eye in a natural movement throughout the design.
    c. Rhythm is established by a repetition.
    d. The types of rhythm include:
        (1) Repetition is repeating the same thing over and over.
            (a) This causes you to become familiar with an item and like it the more you see it.
            (b) You can repeat motifs, buttons, trims, color, texture, pleats, tucks, etc.
        (2) Gradation (progression) occurs when things progressively change in size.
            (a) The stripes on a sweater may start out small near the neckline and increase in width toward the waist.
            (b) The following things may be graudally increased or decreased in size to illustrate gradation: motifs, buttons, trims, flounces, colors (values, intensities, or shadings).
        (3) Alternation is a pattern established by alternating two lines, colors, shapes, etc.
        (4) Opposition is using two opposites together of any art element.
5. Unity (Harmony) - when the art elements are used together to form a single theme.
    a. When unity is achieved all parts of the design have a sense of belonging to the composition.
    b. The term "total look" is often used to describe unity in dress.
    c. Unity is achieved when all parts (garments, accessories, jewelry, and hairstyle) express a single theme that is consistent with the personality of the wearer and the place it is to be worn.
    d. An example would be cowboy riding clothes, cowboy hat, and boots worn by man with an athletic physique to a rodeo.
    e. To achieve unity you must repeat color, shape, texture, etc., while adding some variety (unity with variety) for interest.
    f. Too much unity can be seen in an ensemble composed of a blue skirt, blue shirt, blue sweater, and blue shoes.

V. Textiles

A. Vocabulary

1. Fiber - basic unit of textile yarns and eventually fabrics.
2. Filament - individual hairlike fiber of the man-made fibers.
3. Yarns - fibers grouped and twisted together into a continuous strand.
    a. The warp is a set of yarns running lengthwise in a woven fabric, also called "ends."
    b. The filling is a yarn running crosswise in a woven fabric, at right angles to the warp yarn and are also called "pick", "weft", or "woof".
    c. The wale is vertical columns of stitches in a knitted fabric.
    d. The course is horizontal rows of stitches in knitted fabric.
4. Weave (process of making a fabric on a loom by interlacing the warp and the filling yarns).
5. Knitting (method of constructing fabric by interlocking series of loops of one or more yarns to form a fabric with elasticity).

PLANNING NOTES

B. Natural Fibers

(HO-9)

1. Cotton

[CTIB 022-00-11]
[CTIB 022-00-12]
(SA-12)

- a. The fiber comes from the boll of the cotton plant.
- b. Cotton is the major textile fiber in the world.
- c. The United States is the leading producer of cotton.
- d. The uses of cotton include a wide range of products in the apparel, home furnishings, and industrial areas.
- e. The plentiful supply makes it economical to buy.
- f. The characteristics of cotton include:
  - (1) It is a versatile fabric that is easily dyed and is colorfast.
  - (2) It can be woven into fabrics of all textures and weights.
  - (3) The quality is judged by the cotton fiber length and texture.
    - (a) The highest quality is long and has a fine texture.
    - (b) Sea Island cotton is the best and rarest cotton.
  - (4) Because it transmits moisture easily, the fabric is cool and absorbent.
  - (5) Cotton is suited for blending with other fibers.
  - (6) Cotton is static free.
  - (7) Unstabilized cotton fabric shrinks badly but can be pretreated.
  - (8) Cotton wrinkles badly unless a wrinkle resistant, wash and wear, or permanent press finish is put on fabric.
  - (9) Cotton has a poor crease retention.
  - (10) Cotton deteriorates in sunlight.
  - (11) Cotton is susceptible to mildew.
  - (12) Cotton is a very strong and durable fiber.
- g. Care features include:
  - (1) It can be machine washed and tumble-dried.
  - (2) It can withstand repeated washings.
  - (3) It can be bleached.
  - (4) It has great resistance to heat--can even be sterilized.
  - (5) It can be damp ironed at the hot setting for wrinkle removal.
  - (6) It does not melt, shrink, or stretch when ironed.

2. Linen

[CTIB 022-00-11]
[CTIB 022-00-12]

- a. The fiber is obtained from the flax plant.
- b. Linen is imported into the United States.
- c. Linen is principally used in making dresses, suiting, tablecloths, napkins, and handkerchiefs.
- d. Due to its limited production, importation costs, and the hand labor involved in production, it is expensive.
- e. The characteristics of linen include:
  - (1) It has a crisp, firm feel.
  - (2) It is a smooth, lustrous fabric usually with a heavy texture.
  - (3) It absorbs moisture quickly and allows fast evaporation making it a cool fabric for hot weather.
  - (4) Its smooth finish helps it resist soil.
  - (5) It is moth proofed.
  - (6) Because of its little elasticity and resiliency, it wrinkles easily.
  - (7) It shrinks appreciably when washed.
  - (8) It is susceptible to mildew.
  - (9) It tends to resist dyes.
  - (10) Linen is very durable (strongest of the vegetable fibers) and with proper care it will retain its beauty for a long time.
- f. Care features include:
  - (1) It can be drycleaned.
  - (2) It can be washed in a moderate-action washing machine and tumble-dried.
  - (3) Ordinary bleaches will not injure the fibers.
  - (4) It should be ironed while evenly damp, with a hot iron.
  - (5) It should be ironed on wrong side to prevent a shine.
  - (6) Special care should be taken to prevent scorching.
  - (7) It should not be ironed along creases repeatedly or over-bleached or the fabric will become brittle and split.
  - (8) Material with a woven, embroidered or appliqued design should be pressed on wrong side so design will stand out.

3. Silk

   a. The fiber is produced by the silkworm in the cocoon.
   b. Most silk in the United States is imported from Japan.
   c. It is used principally in men's and women's apparel.
   d. It is a luxurious fabric that drapes gracefully.
   e. The characteristics of silk include:

      (1) It is lightweight.
      (2) It has a natural affinity for dyes making possible many lovely colors.
      (3) It is colorfast.
      (4) It holds its shape well.
      (5) It resists wrinkling.
      (6) It is a poor conductor of heat making it more desirable in cooler months.
      (7) It is capable of absorbing large amounts of moisture without feeling damp or cold, making it desirable for underwear and stockings.
      (8) It does not soil easily.
      (9) It does not shrink.
      (10) It is very susceptible to static electricity.
      (11) It is damaged easily by acids and perspiration.
      (12) It is damaged by heat and sunlight.
      (13) It yellows with age.

   f. Care features include:

      (1) Dryclean unless labeled washable.
      (2) Press on wrong side when damp with moderately heated iron.

[CTIB 022-00-11]
[CTIB 022-00-12]

4. Wool

   a. Forty different breeds of sheep produce about two hundred different types of wool fiber of varying grades.
   b. Australia is the world's top producer of wool.
   c. Wool is very popular for apparel - used to make both dress and tailored clothes.
   d. The characteristics of wool include:

      (1) It is very warm - a natural insulator.
      (2) It absorbs moisture slowly and dries slowly.
      (3) It is very absorbent.
      (4) It is very resilient.
      (5) It holds a press.
      (6) It is nonflammable.
      (7) It is available in varying degress of quality.
      (8) Wool fibers will matt (felt).
      (9) Wool fibers will pill (pills are balls of tangled fibers on the fabric's surface).
      (10) Wool will shrink during washing.
      (11) It has poor resistance to bleach, perspiration, and strong soaps.

   e. The care features include:

      (1) It is best to have a wool garment drycleaned to keep the lines and details at their best.
      (2) After wearing, hang wool garments up to eliminate wrinkles.
      (3) Brush the garment to remove dirt and restore the nap to the fabric.
      (4) Knitted fabrics should be aired, not brushed, and stored flat.
      (5) Washing some wool garments can be done successfully by hand, using cool to lukewarm water and neutral, non-alkali soap or detergent.
      (6) Hot water causes wool to shrink.
      (7) After wetting, wool garments should be dried at room temperature and then brushed.
      (8) Chlorine bleach is harmful to wool.
      (9) Because of the low resistance to heat, wool fabrics should not be ironed with a hot iron.
      (10) Press wool garments with a moistened cotton cloth placed over the wool.
      (11) Knit garments should be laid flat to dry.

[CTIB 022-00-11]
[CTIB 022-00-12]

PLANNING NOTES

C. Man-Made Fibers

(SA-13)

1. Identification

   a. Man-made fibers are identified by a generic name as mandated by law.
   b. Manufacturers identify their particular fibers with optional brand names (trademarked fiber names).
   c. The ten man-made fibers of major importance include: acetate, acrylic, glass, metallic, nylon, polyester, rayon, spandex, triacetate, and modacrylic.

2. General characteristics of man-made fibers (except rayon) include:

(SA-14)

   a. They will not shrink.
   b. They absorb little moisture.
   c. They dry quickly.
   d. They do not absorb surface dirt.
   e. They can be heatset.
   f. They require little or no ironing.

D. Basic Weaves and Knitting

1. Plain weave

(SA-12)

   a. Plain weave is simplest and most often used.
   b. It is found in a wide range of fabrics, from sheerest to heaviest.
   c. Fabrics with a plain weave are reversible unless one side is made the face by finishing or printing.
   d. The appearance can be changed by using yarns of different thickness, special finishes, or by printing a pattern using yarns of different colors.
   e. Each warp yarn passes alternately over one and then under one filling yarn for the whole length of the fabric.
   f. When one filling yarn passes over a warp yarn the next filling yarn passes under the same warp yarn.
   g. Advantages of the plain weave include:
      (1) It is firmly constructed.
      (2) It wears well.
      (3) The plain background offers a good background for printed and embossed designs.
   h. Disadvantages of the plain weave include:
      (1) It wrinkles more than fabrics of other weaves.
      (2) There is no surface interest unless colored yarns make a design.
      (3) It has low-tearing strength.

2. Twill weave

   a. It is the most durable weave.
   b. Each filling yarn floats across two or more warp yarns in a progression which results in a distinct diagonal line or wale.
   c. The twill weave is widely used for work clothes (i.e. denim), suiting fabrics (i.e. serge), and dress fabrics (i.e. surah).
   d. There is more yarn per inch in the fabric constructed with a twill weave so the twill makes a more compact, stronger, heavier and durable.
   e. The floats are short so yarn snagging is not a problem.

3. Satin weave

   a. It is the most luxurious in appearance.
   b. The warp yarns pass or "float" over several yarns (at least four yarns) before interlacing with a filling yarn.
   c. More warp yarns than fillings are exposed on the right side of the fabric producing a high luster.
   d. In the sateen weave, the process is reversed and the filling yarns float.

4. Knitted weave

   a. The knitted weave makes apparel serviceable, absorbent and practical.
   b. The finished fabric may be constructed of one strand or group of yarns.
   c. The chain of loops permits the fabric to "give" or "stretch" in both directions.
   d. The knitted weave is especially suited for underwear, hosiery, and outerwear.

PLANNING NOTES

E. Labeling Information

1. Legislation

a. Certain facts must be included on a garment label by the manufacturer as mandated by law.
b. The Federal Trade Commission enforces garment labeling laws.
c. Retailers are liable for the sale of any mislabeled or unlabeled merchandise.
d. All labels, tags, or other means of identification must be attached to the merchandise when it is sold to the customer.
e. The Federal Trade Commission spot checks retail stores:

(1) Checks for correct labeling.
(2) Checks the statements made by the salesperson about the fiber content of the garment.

(a) The salesperson should look at the label and read it to the customer regardless of how sure the salesperson is of the fiber content.
(b) The salesperson should never speculate about a garment's fiber content and should be sure of all information he/she passes along to the customer concerning care, quality, and wearability.

2. Appropriate care of apparel and accessory items

a. Care instructions found on labels should be followed.
b. Facts that determine a textile item's washability include:

(1) Characteristics of individual fibers or blends of fibers.
(2) Fabric construction, that is whether loosely woven or closely woven or knitted, sturdy or delicate.
(3) The colorfastness of dyes in laundering.
(4) Fabric finishes such as durable press, soil release, water repellance, etc.
(5) Garment construction, that is the durability of seams and construction features. Also the washability of interfacing, linings, buttons, and trims.

(SA-15)
[CTIB 023-00-11]
[CTIB 024-00-11]
[CTIB 024-00-12]

VI. Fundamentals of Apparel and Accessories Merchandising

A. The Complete Fashion Look

1. The importance of accessorizing

a. Fashion emphasizes the total look today which is achieved through accessories.
b. Some accessories are always fashionable while others depend on the fashion focus (example: belts become important when fashions accentuate the waistline).
c. Principles of color, line, detail, pattern and fabric texture should all be considered when trying to achieve a "total look".
d. Accessories have become more popular in the last twenty years; manufacturers now coordinate these accessories with fashionable garments.
e. Accessories have been treated as impulse items in the past, however now they are merchandised and displayed for a "together look".
f. Working women have less time to shop, therefore accessories and merchandise should be located together and salespeople should have a working knowledge of coordination techniques.
g. When the economy slows down, new accessories provide a less expensive means of updating wardrobes.

2. Reasons for using accessories

a. Flatter an outfit.
b. Camouflage flaws in the figure.
c. Give a 'total look'.
d. Give a new look to an old outfit.
e. Express individuality.

(SA-16)
(PR-3; pp. 132-145)
[CTIB 025-00-11]

PLANNING NOTES

B. Latest Fashion Trends

1. Importance of trends

   a. Fashion trends determine the types and the extent accessories will be used.
   b. Fashion trends often make a fashion statement and accessories help to define and accentuate a statement.
   c. You should know essentials about fashionable apparel and accessories merchandise that will help you in coordinating, such as:

      (1) How they are constructed.
      (2) The materials they are made from.
      (3) The proper care and handling of the merchandise.

   d. Customers depend on salespeople for information on fashion trends and assistance in interpreting the trends to achieve a "total look".

2. Rules for accessorizing based on trends

   a. Be creative; accessories can make a small wardrobe expand.
   b. Use understatement, the more color or style the outfit has, the fewer and more carefully selected the accessories.
   c. Have one focal point in a costume where the eye travels first.
   d. With a print outfit (dress, suit, coat), use solid-colored accessories.
   e. Do not stick with old rules (when fashionable, pink and reds can be mixed).

(SA-17)
[CTIB 026-00-11]
[CTIB 026-00-12]

C. Appropriateness for the occasion

1. Factors that influence appropriateness

   a. Most fashionable items at the moment are considered appropriate.
   b. The geographical setting often determines appropriateness (formal attire in a large city setting is more acceptable than in a rural environment).
   c. The climate influences what is appropriate (a football game in New York City and a game in Tampa, Florida would require a different attire).
   d. The age group and socioeconomic class affects appropriateness (an older, more conservative businessman would probably expect that a coat and tie be worn in most situations).
   e. Personal taste always affects appropriateness.

2. Traditional guidelines

   a. Appropriate attire for business meetings should be conservative.

      (1) Women should wear tailored, dressy two-piece suits and men should wear suits and ties.
      (2) Acceptable fabrics usually include wools, wool blends, broadcloth, cotton, and synthetics.
      (3) Basic colors are best, except when fashion dictates otherwise.

   b. Appropriate attire for formal occasions has more flair.

      (1) Women should wear long or short evening dresses with necklines accentuated and men should wear formal attire (tuxedo).
      (2) The most acceptable fabrics include brocade, velvet, silk, satin, chiffon, faille, and jersey.
      (3) Appropriate colors include black and shimmering fabrics for women and dark suit colors with neutral shirt and tie for men.

   c. Appropriate attire for sports events.

      (1) Both men and women should wear clothing with simple lines and that is well fitting to allow for freedom of action.
      (2) Fabrics should be washable and might include cotton, poplin, chambray, nylon or rayon jersey.
      (3) Colors that are bright and exciting are always acceptable.

(SA-18)
(SA-19)
[CTIB 027-00-11]
[CTIB 027-00-12]

# STUDENT ACTIVITIES

## MERCHANDISE INFORMATION FOR FASHION MERCHANDISING

SA-1 Introduction: Reproduce the quiz and have students respond to the questions. Discuss these responses in class. See page 22.

SA-2 What Is Color?: Show filmstrip, "Color Concepts" to introduce the unit. This is available through J. C. Penney Co., Educational and Consumer Relations, 1301 Avenue of the Americas, New York, N.Y. 10019. Reproduce the discussion questions on page 24 and have students answer these while they are viewing the filmstrip. After they have finished, discuss another factor (texture) that affects color. Emphasize that they now know six things that affect color. This filmstrip introduces most of the topics covered in this unit on color.

SA-3 Color Project: Provide paper, brushes, paper cups of water, paint (red, yellow, blue, black and white only), powder paint will do, and magazines (the library often has old ones or you can ask the students to bring them from home). Encourage the students to be original--to think of their own personal way of depicting the different parts of the project. Be sure to explain that "true" colors won't be achieved unless they are working with artist's paints. Allow one day for planning, two days for the color wheel, one day for values and one day for color schemes and be sure that the students understand the time frame, otherwise this project can take too long. See page 25.

SA-4 Warm and Cool Colors: Have pieces of material or construction paper in green, yellow-green and blue-green (or other hues of your choice). Place them next to each other and let the students see for themselves that yellow-green appears warmer than green and that blue-green appears the coolest of the three.

SA-5 Psychological Effect of Color: Reproduce one instruction sheet for each student. See page 26. Part I: Have the students complete and then discuss in class, noting the similarities in color choices. Part II: Supply scrap material, colored paper, foil buttons, yarn, etc. (collage materials), scissors, and glue. Show finished work in class and let the students try to guess the words selected. This provides an opportunity to review information as you discuss the merits and drawbacks of the colors selected.

SA-6 Mixing Colors: Collect twelve small jars (i.e. baby food jars) and fill three with water and add food coloring to make one red, one blue, and one yellow. In class, mix equal amounts of the above colors in three other jars to create the secondary colors. Then mix equal amounts of a primary and a secondary color in the last six jars to create the intermediate colors. This is an easy and fairly dramatic way to illustrate how these colors are formed.

SA-7 Color Schemes: Use a flannel board color wheel to illustrate the color schemes and the placement of the colors on the wheel. Cut fashion outfits from magazines to illustrate each scheme (students relate to them better, if they can see the colors put together into an outfit) and place the outfit on the bulletin board as each scheme is discussed.

SA-8 Complementary Colors: Illustrate complementary colors by preparing a sheet on which you have colored three circles in the three primary colors with a black spot in the center of the three circles. (See page 27.) Prepare a separate white sheet of paper with simply the one large black dot in the center. Have the students stare very intently at the black spot in the center of the colored circles for about thirty seconds or more, then shift their gaze to the lone black spot on the other page. They should see faint after-images around the spot which will be the complements of the circles on the first page. This usually impresses the students and convinces them that complementary colors are not just chosen at random.

SA-9 "My Best Colors": Ask the students to list their personal coloring and personality type on a sheet of paper. Then tell them that during the next three days, they should collect five different fabric swatches which would be excellent color choices for them, and mount them on the page which contains their personal coloring identity. Finally, ask them to list the colors that should be avoided.

SA-10 Personal Colors: Provide a variety of scarves or lengths of materials in the different colors on the color wheel and some neutrals (in varying values). Ask several students with very different personal coloring to stand in front of the class. Drape the materials around each person's shoulders (one color at a time). Have the class decide which students look best in each of the colors. The class will enjoy this but there will not be full agreement on the "best" colors. Usually the consensus will choose the "correct" person and color and you can explain the "whys" in relation to each person's coloring.

SA-11 Color and the Figure: Reproduce page 28 for each student and have them answer in class. Discuss answers in class.

SA-12 Textile Fiber, Weave and Knit File: See page 30.

SA-13 Man-made Fibers: See pages 31 and 32. Familiarize students with information.

SA-14 Case Study: See page 33.

SA-15 Labeling Information: See page 34. Teacher Instructions: Bring ten items of clothing to class and set them up at separate points around the classroom. Make sure the clothing items have labels intact.

SA-16 Case Study: See page 35.

SA-17 Wardrobe Plan: See page 36.

SA-18 Wardrobe Plan: See page 37.

SA-19 Coordinated Outfits: See page 38.

BEST COPY AVAILABLE

SA-1

## COLOR, LINE AND DESIGN - INTRODUCTORY QUIZ

### WHAT IS YOUR CIQ?

(Color Intelligence Quotient)

Color is a very important factor in our lives, but we see it around us so often that we may fail to look at it closely. Listed below are some questions of general interest about color. Check your CIQ and see how many you can answer.

1. What color do most men like best?
   What color do most women like best?
2. What color do people like least of all?
3. What kinds of colors do older people prefer?
   What colors do children under six like most?
4. Name a cool color; a warm color, an exciting color, a heavy color, a subdued, quiet color, a light color.
5. Do colors affect the way we feel physically?
   Do colors affect the way we feel psychologically?
6. What causes a rainbow?
7. What color can be seen the farthest distance?
8. Does the color of a car affect its safety on the road?
9. Why are the walls of an operating room usually painted green?
10. How many colors are there?

Prepared by the Educational and Consumer Relations Department of the J. C. Penney Company.

KEY:

1. Men prefer blue; women prefer red. Reports from psychological tests show that the general order of preference for colors is blue, red, green, violet, orange, and yellow. Some say that there is no significant difference between men and women in their color preferences. Most writers tend to agree that women are the more fickle in their choice and more apt than men to change their preference with the fashion trend.

2. Yellow appears to be at the bottom of the preference list for most people. One study reported that about 40% of its subjects expressed a definite dislike for yellow while less than 10% reported such feelings toward red, blue, and green.

3. The elderly person chooses cheerful hues in subtle combination; the young child chooses vivid, pure colors - likes reds best and blue least.

4. Cool color - green, blue, violet; Warm color - yellow, orange, red; Exciting color - red, red-purple; Subdued color - violet, blue-violet, blue; Light color - white, yellow.

5. Studies show that colors do have a physical effect on people - especially red, green, and blue. Red excites the emotions, quickens muscular reactions, makes time seem to drag. Green has a calming effect and slows muscular response. Blue also calms, slows muscular reaction and causes a person to underestimate time.

   The colors surrounding one may also affect one's moods.

6. Refraction of light causes the rainbow, an arc of all the colors in the spectrum, is formed opposite the sun by the refraction and reflection of the sun's rays in the droplets of water in the air. (rain, spray, or mist)

7. Yellow. The British Color Council has reported that yellow has the greatest visibility. Because of its excellent visibility, yellow is used for taxicabs, school buses, children's raincoats, highway lines and signs.

8. Yes. Studies at UCLA show that the color of a car affects driver judgments of distances. At 200 feet, some colors were judged up to six feet closer than others. Blue and yellow seemed closer, gray seemed farthest away.

9. To prevent the after-image from hindering the surgeon's work. If the walls were painted white, when the surgeon looked up he would see an after image of red - or green - with the green wall, the after image does not hinder work because the eye adjusts more easily.

10. Hundreds of thousands. Business and industry lists over 500,000 commercially different colors.

## WHAT IS COLOR?

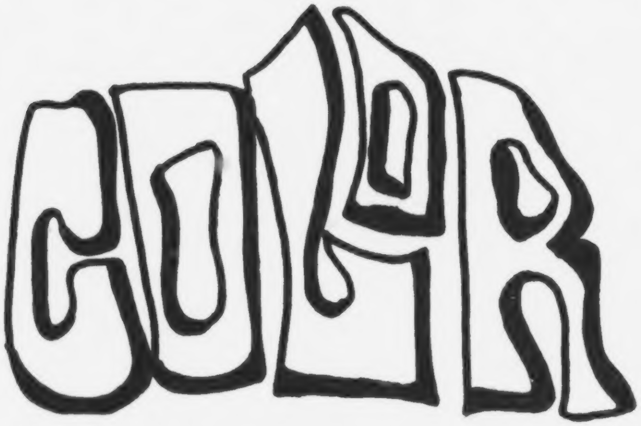
As you view the filmstrip "Color Concepts", answer the following questions:

1. Color is ______________, because without it we cannot see color.
2. There are more colors in a ______________ than in a bucket of paint.
3. What five things affect color?
   a.
   b.
   c.
   d.
   e.
4. How does colored light affect the colors that we see?

5. Do warm and cool colors actually put out different amounts of energy? Explain.

6. From class discussion determine a sixth item that affects color. What is it?

SA-3



1. Design and make your OWN color wheel using the 12 primary, secondary, and intermediate colors. Be original - let this design be yours and yours alone...these colors can be shown in many ways, not just in the traditional wheel. You will mix your own paints for this project, using only the three primary colors. You may expand this to include the values (#2) if you desire.
2. Select one color and make a chart, showing the pure color and five tints and five shades created from that color. Again, be original. Think of your own personal way to depict this chart. You will use the one color chosen, white and black to create this chart. Remember, it is difficult to get many shades from a dark color and many tints from a light color.
3. Make a design of your name or initials and color this design in one of the six color schemes. LABEL THIS DESIGN, according to which color scheme it represents (under the label, write the names of the hues you have used, in case there is a question by your instructor). You must mix your colors for this design from the three primary colors.
4. Study apparel in magazines and find an example of clothing illustrating each of the five remaining color schemes (you may omit the scheme used in Number 3). Cut these examples out and glue them to a sheet of paper. LABEL each example according to the scheme it represents and write the names of the hues that you see represented.

REMEMBER...YOU WILL BE GRADED ON NEATNESS AND ORIGINALITY (anyone going into the fashion world as a career needs to develop their originality as much as possible).

Your rating scale is follows:

Completed each part - 20 points
Each part completed correctly - 50 points
All parts completed neatly - 20 points
Originality shown on 1, 2, and 3 - 10 points

100 points

PROJECT DUE____________________

## COLORS CREATE FEELINGS

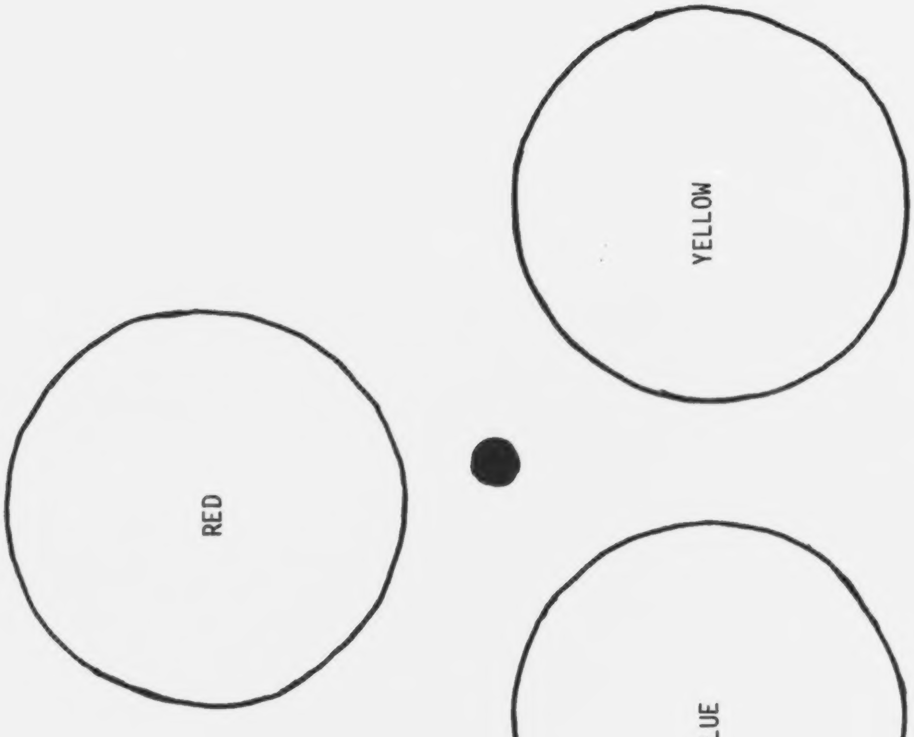
To successfully use and appreciate color you must understand it. A person's response to color will permit him to feel that a color arrangement is pleasing and satisfying or otherwise. In the following exercises, you will have the opportunity to consider the psychological or symbolic effect of color on most people.

I. Write the names of the colors that best describe each of the following words or phrases in the blank following the word. Use only the six primary and secondary colors: red, orange, yellow, green, blue, and purple.

1. Very hot ____________
2. Fast moving ____________
3. Irritating ____________
4. Bold ____________
5. Daylight ____________
6. Loud ____________
7. Very cold ____________
8. Light ____________
9. Stable ____________
10. Dignified ____________
11. Soothing ____________
12. Heavy ____________
13. Sad ____________
14. Very old ____________
15. Quiet ____________
16. Slow ____________
17. Young ____________
18. Exciting ____________
19. Lively ____________
20. Happy ____________
21. Purity ____________
22. Greed ____________
23. Sickness ____________
24. Conservative ____________

II. Select a word that describes an emotion (sad, happy, rage, etc.) and depict this word through the use of color only. Use collage materials in the classroom or bring your own to class. Write the word that you have selected on the back of the paper on which you have constructed your collage.

SA-8


YELLOW
RED
BLUE

## COLOR AND THE FIGURE

Some colors grow on you--literally. White and all the pale pastels catch and reflect light, making the areas they cover look larger. Black and all the dark colors appear to recede, because they absorb light. Therefore they appear to reduce size. Cool colors also appear to reduce size usually, while warm colors seem to increase size. Contrasting colors shorten while solids appear to add length. Therefore, judicious use of color can help de-emphasize figure problems.

Circle the letter of the outfits below that you think are right for the figure type mentioned.

1. A top-heavy girl should wear:
   a. a green shift with a white yoke and short sleeves.
   b. a navy sweater, red plaid skirt.
   c. an orange checked shirt and brown jeans.
2. A "hippy" girl should wear:
   a. a yellow turtleneck sweater and a gray A-line skirt.
   b. a red sheath, with a red plaid belt.
   c. a navy and white striped tee shirt and white pants.
3. A heavy male should wear:
   a. a light blue leather jacket, white shirt and light blue pants.
   b. red plaid shirt and red jeans.
   c. a single breasted brass buttoned navy sports coat, dark grey trousers.
4. A bony featherweight girl should wear:
   a. a white blazer, navy pleated skirt.
   b. a clingy black sheath dress.
   c. a bronze corduroy pantsuit with chocolate shirt.
5. A short male, wishing to appear taller should wear:
   a. brown and beige plaid pants and vest, beige sport coat, yellow tie.
   b. grey suit with vest, white shirt, maroon paisley print tie.
   c. light blue pants, white shirt, navy blazer.

KEY:

1. b
2. a
3. c
4. a or c
5. b

This is why:

1. b is right because the dark tops and vivid skirt appear to readjust her proportions. a is wrong because the white yoke emphasizes her bosom. c should be reversed since hers is the ideal figure for bright pants with tame tops.
2. a is right because she needs light at the top and everything below the waist de-emphasized. b is wrong because the sheath and belt emphasize the hips. c is wrong because she needs dark to medium colors.
3. c is the perfect suit for him--all a dark color and the buttons provide the necessary vertical line. a is wrong because there is too much contrast and leather adds too much bulk. b is wrong because red tends to enlarge an area.
4. a is right because the light top balanced by the pleated skirt adds width all over. b is wrong because the black dress will make her look skinnier. c is right because the corduroy has the depth and dimension she needs as well as a positive color.
5. b is right because the solid color along the entire length of the body appears to add length to his body. a and c tend to shorten because of the contrasting colors.

# TEXTILE FIBER, WEAVE AND KNIT FILE

Teacher Instructions: During the discussion of textiles, students should complete a textile fiber, weave and knit file. The file will consist of index cards with fabric samples. The samples will be obtained when visiting a fabric store. The student should explain to the fabric store manager that he/she is studying textiles in class and needs sample swatches to complete a textile fiber, weave and knit file.

Student Instructions:

1. A swatch of the following fabrics, weaves and knits should be obtained:
    - a. 100% cotton
    - b. 100% linen
    - c. 100% silk
    - d. 100% wool
    - e. plain weave
    - f. twill weave
    - g. satin weave
    - h. warp knitting
    - i. weft knitting
2. Mount each fabric sample on a separate index card. Provide the following information on each fiber under the sample.
    - a. Fiber content
    - b. Fiber characteristics
    - c. Special care instructions
    - d. Any special finishes applied to the fabric
3. Mount each weave and knit sample on a separate index card. Provide the following information on each weave and knit under the sample.
    - a. Weave or knit name
    - b. Fiber content
    - c. Weave or knit characteristics.
4. You will be graded on:
    - a. Completeness of project
    - b. How well directions were followed
    - c. Use made of class time
    - d. Neatness

## CASE STUDY

Student Instructions: Read the following case study and consider the advantages and disadvantages of cotton and polyester and write the recommendation you would make to the customer.

You are a sales associate in the men's department at Logan's Department Store. A customer asks your opinion about which shirt to buy. He needs dress shirts for work. He is required to wear a coat and tie to the office. He is also a bachelor who sends his shirts to the laundry for cleaning. He must decide between a shirt of 100% cotton or 65% polyester and 35% cotton blend.

KEY:

Cotton - Advantages: cool, comfortable, longwearing, launders easily
Disadvantages: wrinkles easily and requires ironing, shrinks after first washing

Polyester - Advantages: very wrinkle resistant therefore requires little ironing, resists shrinkage, launders easily, drapes well
Disadvantages: absorbs little moisture therefore is a hotter fabric

Because the customer must wear a coat and tie to the office, coolness would be an important factor. The cotton shirt would be the cooler of the two choices. The biggest disadvantage of the cotton shirt is that it must be ironed after washing. This does not present a problem to the customer because he sends his shirts to the laundry. He may choose to cut down on his laundry bill by doing his own shirts. In this case he would find the polyester/cotton blend shirt easier to launder because it requires less ironing.

SA-15

## LABELING INFORMATION

Examine 10 clothing items that are set up at various points in the classroom. Read the labels that describe the fiber content and care requirements. Using information from the label and information you have learned in class complete the following chart.

| Clothing Item | Fiber Content | Care Instructions |
|---|---|---|
| 1. | | |
| 2. | | |
| 3. | | |
| 4. | | |
| 5. | | |
| 6. | | |
| 7. | | |
| 8. | | |
| 9. | | |
| 10. | | |

# CASE STUDY

You are to play the part of a fashion buyer who has just redesigned his/her department in order to better merchandise accessories to achieve the "total look". The accessories department as a separate entity, has been eliminated and incorporated into the other appropriate departments within the store.

Choose either a men's or women's department and prepare a written report to your salespeople concerning your reasons for incorporating your accessories department into the ready-to-wear departments. Stress benefits to the customer, to salespeople, and to the company.

# WARDROBE PLAN

Look through several magazines and newspapers and take note of the styles worn. What trends do you notice? Write a paragraph about these overall trends.

Design one totally coordinated wardrobe plan, choosing either men's or women's clothes. Include at least one item in each category.

1. Sleepwear
2. Business attire: men's - suit, shirt, and odd pair of pants
   women's - suit or dress
3. Outerwear: coat, scarf, two styles of hats, gloves, umbrellas
4. Casual: pants or slacks, shirt or blouse, jacket
5. After-five: men's - tuxedo or dress suit, dress shirt, jewelry
   women's - long or cocktail dress, handbag, jewelry

# WARDROBE PLAN

Choose three different seasonal outfits for yourself: one for a business meeting, one for attending a wedding, and one for a sports event. You may use pictures in magazines, catalogs, or newspapers, or you can sketch or photograph actual garments. Put each outfit on a separate page and accessorize each outfit on that page. List all accessories you used on the back of each page. Choose a variety of accessories to compliment each outfit using principles of color, line, detail, pattern and fabric texture to make you a more attractive person.

# COORDINATED OUTFITS

- Using a fashion magazine (Men's Wear, Glamor, Vogue, Ebony, Women's Wear Daily) cut out three pictures of coordinated outfits - one man's, one woman's, and one child's. Place each one on a separate paper. Then, describe how each coordinated look was achieved using the principles of color, line, and design. In addition, list three occasions to which it would be appropriate to wear each outfit.

## Unit III - Merchandise Information

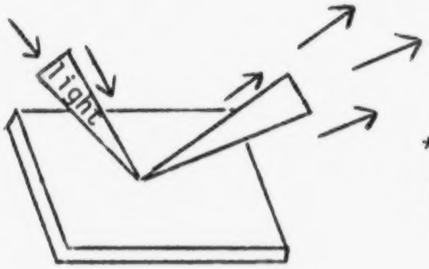
HO-1 What Makes Color
HO-2 Values of Color - A number of transparencies and duplicating masters can be found in Color In Display.
HO-3 Psychological Reactions to Color
HO-4 Know Your Colors - Color In Display, Transparency 1 and Duplicating Master 1A.
HO-5 Color Schemes - Color In Display, Transparency 3, Duplicating Master 3A
HO-6 Colors Influence on Fashion
HO-7 Five Basic Figure Types
HO-8 Line In Clothing
HO-9 Natural Fibers

TM-1 Monochromatic - Color In Display - TM-3, dm*, 3A, 3B
TM-2 Analogies - Color In Display - TM-3, dm, 3A, 3B
TM-3 Complementary - Color In Display - TM-3, dm, 3A, 3B
TM-4 Split Complementary - Color In Display - TM-3, dm, 3A, 3B
TM-5 Double Complementary - Color In Display - TM-3, dm, 3A, 3B
TM-6 Triadic - Color In Display - TM-3, dm, 3A, 3B
TM-7 Achromatic
TM-8 Vertical Lines
TM-9 Horizontal Lines
TM-10 Diagonal Lines
TM-11 Curved Lines

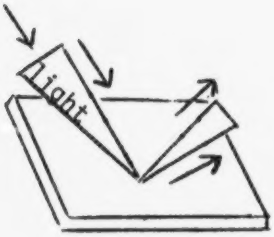
* dm - indicates duplicating master

# WHAT MAKES COLOR

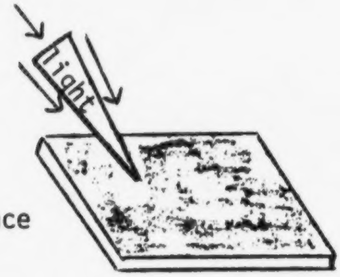
Most of the colors we see are reflected from the surface of objects. Surface color depends upon the pigments in the surface. When light rays strike an object, some rays are reflected, but others are absorbed or trapped. This brings about color by absorption.



*Almost all the rays of white light falling on the white surface are being reflected.



*The gray surface is absorbing a little bit of all rays and therefore appears to be darker than the white object.



*The black object is absorbing almost all rays. White, gray, and black are colorless or neutral. The only difference between them is one of brightness, which is due to the difference in the amount of light reflected.

A color is seen when all the rays of white light are absorbed except one. That one is reflected and that is the color seen.

* Technically black, white and gray are not colors.

# PSYCHOLOGICAL REACTIONS TO COLOR

1. Temperature: Colors have a temperature value. To the spectrum the short wave length hues of blue and blue-violet are cooler in temperature than of orange and red.
    a. The reason for this is physical, because it is known that the lighter the color tone, the more the sun's rays are reflected; while the darker the shades, the less the sun's rays are reflected, and the surface will absorb most of the heat.
    b. Because of this we may dislike a brilliant red dress on a hot day, but react favorably to a warm red winter coat.
2. Weight: Dark hues and dark values appear to have more weight than light hues and values.
    a. It is more usual to see a dark skirt worn with a lighter blouse.
    b. Because dark colors appear heavy, the extremely over-weight person would be wise to avoid an all-black costume. The completely dark costume adds to the impression of solidity and weight.
3. Motion: Warm colors, particularly in bright intensities, give activity and sparkle to a costume because they seem to move forward. Because of this they are called advancing colors. Cool colors and colors of low intensity seem to have less activity or actually seem to retreat.
    a. A person desiring to reduce their size should select receeding colors for costumes.
    b. The activity suggested by colors of strong intensity makes them more acceptable in sports or formal clothing, while the restraint of low intensity and dark values is more appropriate for tailored street or travel wear.
4. Age: Certain values, intensities, and hues appear either old or young.
    a. Dark and dull colors which are quiet and conservative are thought of as old. Light, clear, bright colors are associated with the vigor and activity of youth.
    b. Cool colors seem older than warm colors.
    c. The use of all black accessories with a costume increases its apparent severity or maturity, whereas white accessories may add a fresh youthful note to the costume.

# PSYCHOLOGICAL REACTIONS TO COLOR

Color is symbolic of our feelings and emotions. It causes an emotional experience. People react to it, have definite attitudes toward it. They can be attracted to it, or repelled by it. Very few people are neutral in their feelings about colors; their personal preferences often reveal their personalities.

1. Red is the oldest and strongest color and the greatest stimulator of our emotions.
   a. It expresses blood, war, rage, fierceness, hate, anger and sin; yet it suggests love, beauty, happiness, and cheerfulness. It is contradictory in nature. Children love toys painted red; yet the matador uses a red cape to incite the anger of the bull he is trying to kill. Red is associated with sin as "scarlet woman" indicates, but it is also associated with holiness for it is used extensively in the vestry of the church. Because of its diverse nature, it is one of our most popular colors.
   b. Red is bold, aggressive, warm, exciting, and may seem crude and obvious. Red-violet is exciting, mysterious, warm irritating. Red-orange is strong, warm, advancing, bold and demanding.
   c. The most compelling of all colors in emotional appeal, red symbolizes valor, ardor, love, energy, fire, danger, enthusiasm, vigor, aggressiveness and heat. On the bad side, red also symbolizes evil (the devil is pictured with a red suit), cruelty, wrath, and sin (the Church relates sin to the devil or Satan). A favorite expression in religious usage is, "though your sins be as scarlet . . ."
   d. People who prefer red are inventors and innovators; they have lots of energy and are sexy.

2. Blue
   a. Blue is a cool, modest color emblematic of divinity, honor, and truth. Its qualities are retreating as it suggests despondency or loneliness often referred to as the "blues."
   b. Blue is cold, peaceful, reserved, conservative, and quiet. Blue-violet is reserved, cold, mature, and may be melancholy and depressing. Blue-green is reserved, cool, pleasant, and quiet.
   c. Blue is the favorite color of all males. It symbolizes truth, wisdom, divinity, eternity, and human immortality. Blue symbolizes the heavens and etheral values; it also denotes coolness, cold, ice, chill, and peaceful composure. On the bad side, blue may denote dark or evil moods, depression, and despondency.
   d. "Blue people" tend to be conservative and are a calming influence. They are usually the people in the executive suite; the achievers.

3. Yellow

   a. Yellow also has a dual personality as it suggests light, glory, wisdom, gold and wealth; while green-yellow is associated with disease, cowardice, jealousy, and envy.

   b. Yellow is happy, warm, cheerful, rich, and friendly. Yellow-orange is sparkling, gay, lively, warm, cheerful and friendly.

   c. The lightest of the colors, it symbolizes brightness, the sun, purity, unity, warmth, and is a close cousin to gold, the symbol of wealth. Yellow signifies divine love, enlightenment, and understanding. In China, yellow is the favorite color and stands for the majesty and supremacy of the Imperial palace. Orientals regard orange as a modified yellow. Yellow has bad or evil connotations also - meanness, treason, cowardice, and deceit. "A yellow streak down his back" - this expression illustrates such sinister symbolism.

   d. Individuals who prefer yellow tend to be intellectuals, or "loners." People who prefer brown, a shade of yellow-orange, are solid, down to earth types, who make good spouses.

4. Green

   a. Green has qualities of both yellow and blue but is not as extreme as either. It is restful to the eyes and nerves and it symbolizes spring, youth, happiness, prosperity, and tranquility.

   b. Green is quiet, peaceful, serene and friendly. Yellow-green is cheerful, friendly, sparkling, and warm. Blue-green is reserved, cool, pleasant, and quiet.

   c. Closely allied with blue, green has similar significance and traditional symbolism. Green is the color of nature, and it denotes life, freshness, rebirth, or renewal of life, coolness, quietness and relaxation. Green has long been a favorite color of the interior decorator because of the foregoing symbols. On the evil side, green denotes jealousy, rot, spoilage, and impurity.

   d. Individuals who prefer green are usually agreeable and steady, and have the ability to get things done.

5. Violet (Purple)

   a. Purple suggests regality, sorrow, sadness, weariness, or solemity. The lighter tints represent a feminine delicacy often associated with drifting odors of perfume. Varying shades and tints of purple are becoming to older people with gray hair.

   b. Violet is dignified, regal, cold, domineering, or depressing, and mysterious. Blue-violet is reserved, cold, mature and may be melancholy and depressing. Red-violet is exciting, mysterious, warm and irritating.

c. The ancients always regarded purple as the color of royalty and wealth, chiefly because it was in short supply, and therefore, expensive to purchase. Purple also symbolizes dignity, divinity, and combined love and wisdom. . .(the church's main emphasis) since purple is a mixture of red (love) and blue (wisdom). Purple may mean mourning, and in fashion there is a tendency for this color to be associated with old age or maturity.

d. Individuals who prefer purple are often impractical, and usually charming and self-satisfied. "Purple people" give the best parties.

6. Orange

a. Orange is lively, cheerful, vivacious, more youthful and less aggressive than red. Red-orange is strong, warm, advancing, bold, and demanding. Yellow-orange is sparkling, gay, lively, warm, and cheerful.

b. "Orange people" are delightful people who are very undependable.

# COLOR'S INFLUENCE ON FASHION

When choosing the best colors for an individual you have a color to start with. . . their skin color tone, their hair color, and their eye color. You must also consider their figure and personality type, and even the occasion for which the outfit is to be worn.

Because skin tone is responsive to coloring placed next to it, selections of becoming colors should be made for specific complexion types. When an agreeable choice of colors is made in an outfit, the skin tone comes alive and the individual has a healthy glow which is necessary for an attractive appearance. On the other hand, a bad choice of colors results in a faded-out or subdued skin tone. Highlighting the hair and eyes can be done with the choice of the proper colors, as long as they are also right with the skin tone. When ever there is a conflict between skin tone and/or eye and hair color, always complement skin tone.

Well chosen vivid colors can enrich the facial tone. Vivid hues are most becoming to the slender, well proportioned figure. Stout people should avoid intense bright colors, especially in the advancing hues (they may wear warm, subdued tones). Vivid hues tend to increase size, and make the figure lines more noticeable. A very slender figure, by means of garment style may conceal the angularity of body line, and appear slightly larger in bright hues without over accenting the silhouette. Vivid hues are usually warm, aggressive, and advancing. They should be selected with care by even those for whom they are most becoming (the darker skin tones, with darker hair and eye color). Vivid tones are appropriate for the outgoing, vivacious personality. . . never lose individuality and personality with a poor color selection.

Cool colors flatter almost all figures. Cool colors are receding and make forms appear smaller. They not only affect figure proportions, but soften the figure silhouette. Heavy individuals are much less self-conscious dressed in pleasing hues for their figure type in values from cool hues. The demure person is usually more comfortable in cool tones.

Light values (by means of reflective qualities) tend to lighten, animate and increase the natural face coloring. Light color values in garments appear to increase the figure size. Therefore they are a better choice for the slender person rather than the heavy one.

Dark values are opposite in effect from light values. They absorb the light rays, appear to drain the natural colors from the face, and are especially good for those individuals who have a high, vivid facial coloring. The too slender figure should avoid dark values, because they are slenderizing. At times a small amount of dark coloring in an accessory may repeat eye or hair tone and provide the proper emphasis for some individuals in their choices of wearing light, bright or neutral tones.

An individual should have vivid facial coloring, if they choose to wear black near the face, as it drains the color from the face. Colorful blonds successfully wear black as do brunettes with a fair or glowing complexion. Black skins should avoid black because there is little contrast, hence interest, in the total look. Black should not be worn by persons with a pale or yellowish skin tone. Black appears to decrease size, so is good for the large figure (but because of qualities mentioned above, it is usually best to place a lighter color around the face).

White, of all light tones, reflects sunlight to the greatest degree. Therefore, it helps in illuminating the face and is quite flattering to most skin tones. Persons with ruddy coloring as well as very dark skin do not wear white successfully because of too much contrast. White appears to increase the figure proportion, and should be avoided by the person with a large frame. White appears cool and refreshing, and is especially appealing in the summer months.

Finally, remember the rules of the color wheel and color schemes. Complementary colors intensify each other. Therefore red hair is flattered by green, and blonds appear more blond when wearing lavender. By the same rule, ruddy skin tones are intensified by wearing green, and sallow complexions are further "yellowed" by purple, and the person with blue undertones in their skin should avoid orange.

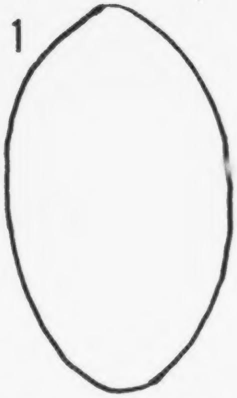
The challenging part of choosing the best color for an individual is the interplay of the following parts:

1. Figure type
2. Skin color
3. Hair color
4. Eye color
5. Personality
6. Occasion

The best color choice for the person with dark hair and skin tone, might not be best, when the figure is heavy or the personality demure. The dark, small framed person who works in a bank also has opposing color choices to consider. Accept the challenge, however and you will have the satisfaction of achieving a well-planned, flattering total fashion color "look".

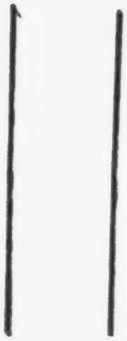
# FIVE BASIC FIGURE TYPES

1



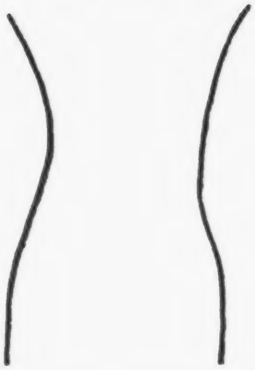
Heavy or Round

2



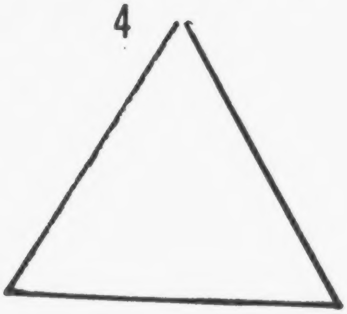
Thin

3



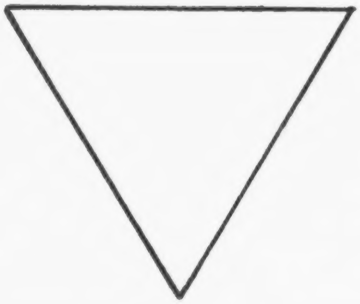
Evenly Proportioned

4



Narrow Shoulders or Small Bust
Full Hips

5



Broad Shoulders or Full Bust
Narrow Hips

# LINE IN CLOTHING

Lines can be used in garments to make a person look taller, shorter, heavier or thinner. Lines, and the illusions they create, can make hips look large or small, shoulders broad or narrow and waists look thick or thin. The effects that lines produce are related to other factors such as:

the shape of the body
color and texture
degree of contrast (so that lines are noticed)
comparison of adjacent shapes
the effect the viewer expects

There are two kinds of lines -- straight and curved. Straight lines have three directions -- vertical, horizontal, or diagonal. Curved lines may be restrained (soft, flattering) or full.

Straight lines result in more formal or more tailored clothes, often with a masculine feel. The single vertical line usually lengthens the body and makes it appear more narrow, because the line leads the eye up and down the body. However, when vertical lines are repeated in quantity, the eye begins to measure width (which adds width to the body) unless the multiple vertical lines are small and spaced closely together. Horizontal lines usually add width and shorten the body, because they carry the eye across. Just as repeated vertical lines add width, some horizontal line spacing produces the illusion of length when the space between lines is increased. Diagonal lines assume the characteristic of the vertical or horizontal line as the degree of slant approaches each extreme. The use of the diagonal line is usually very pleasing in clothing, and is one of the best lines to use when trying to camouflage poorly proportioned parts of the body. It it usually considered slimming since the vertical diagonal is most often used.

Curved lines follow the contour of the body and are usually flattering to the feminine figure. They are informal and soft. As the curved line becomes exaggerated it may be easily overdone in a design. The restrained curve will usually flatter a plump figure, while extreme curves will add the illusion of even more fullness.

Lines are emphasized by both repetition and contrast (such as piping along the waist line in a contrasting color). Not all internal structural lines are noticeable because of lack of contrast or emphasis. Internal lines may not be seen on printed or very dark fabrics. On the other hand, line is emphasized by hue or value contrast. Emphasis of line in a garment is important, because the lines that are emphasized are the lines that determine which illusion is created.

# Natural Fibers

| Fibers | Fabric Types | Advantage | Disadvantage | Care | Use |
|---|---|---|---|---|---|
| Cotton | Broadcloth, Chambray, Chintz, Corduroy, Denim, Percale, Pique', Seersucker, Terrycloth, Organdy, Velveteen, Gingham, etc. | Inexpensive, Cool, Comfortable, Long-wearing, Holds its Shape, Launders Easily, (Machine Washable), Can be bleached, Moth Proof | Wrinkles Easily, Requires Ironing, Shrinks, Mildews, Deteriorates in Sunlight | May be pressed with a hot iron.<br>Can be boiled without damage.<br>May use any type soap or bleach. | Apparel, Home-furnishings, Industrial areas |
| Linen | Damask, Crash handkerchief, Linen, Dress Linen, Lace | Long-wearing, Lint free, Cool, Comfortable, Does not soil readily, Launders easily, Dries quickly, Moth proof, Retains natural crispness. | Expensive, Wrinkles easily, Requires Ironing, Must be dampened for ironing, Mildews, Breaks easily under pressure | Dry clean or wash in warm water and mild detergent. Dry white linens in sun. Iron on side to avoid a shine. | Fine table linens, Handkerchiefs, Summer dress wear |
| Silk | Broadcloth, Crepe, Shantung, Taffeta, Chiffon, Pongee, Jersey, Brocade, Surah, Ribbon Knits | Luxurious feel and appearance, Light weight, Wrinkle resistant, Holds shape, Sheds soil, Strong, Does not shrink | Expensive, Water spots damaged by perspiration yellows with age, Damaged by heat and sunlight, Often not colorfast to washing, Splits or cracks, Weakened by both acid or alkali, Yellows with chlorine bleach. | Wrinkles will fall out between wearings. Wash by hand in lukewarm water and mild soap suds. Dry indoors away from direct heat. Iron damp dry. Use a warm iron and press on the wrong side. | Dresses, Blouses & shirts, Scarves, Lingerie, Loungewear (men & women's), Linens |
| Wool | Flannel, Tweed, Broadcloth,Challis, Fleece, Jersey, Serge, Crepe, Gabardine | Warm, Lightweight, Wrinkle resistant, Holds a press, Sheds soil and water, Non-flammable, Static free, Easy to care | Susceptible to moths, Slow drying, Shrinks, Damaged by perspiration, Weakened by hot water and alkalies, Mats if improperly laundered, Becomes shiny if improperly pressed, Singes or scorches easily, Turns yellow, Dissolves in chlorine bleach | Little if any pressing is necessary between wearings. Wash by hand in lukewarm water if hand tag so indicates. Press with a steam iron on the wrong side. Knit garments should be flat dried. | Winter clothing, Blankets, Carpets, Millinery |

# VERTICAL LINES

Suggests:

height

slenderness - elegance

masculine

formality

tailored clothes

# HORIZONTAL

LINES suggest:

width .... soft .... graceful ....

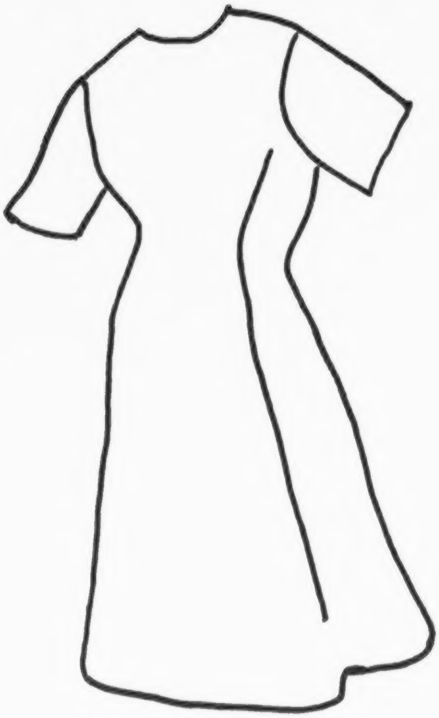
informality ... feminine

# DIAGONAL LINES

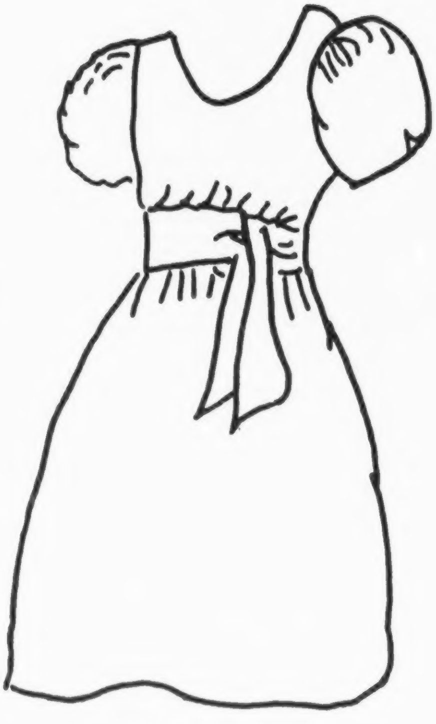
suggests:

- height
- slenderness
- activity
- more broadening as they flatten out

# CURVED LINES



Restrained Curve



Fall Curve

# EVALUATION MEASURES AND KEYS
## (COMPETENCY / TEST - ITEM BANK)

## TABLE OF SPECIFICATIONS FOR TEST CONSTRUCTION

PROGRAM AREA Marketing and Distributive Education

OURSE NAME Fashion Merchandising

UNIT Merchandise Information

| | EXPECTED STUDENT OUTCOME | | | | | |
|---|---|---|---|---|---|---|
| Competency | Cognitive Level* I | II | III | Performance | % Importance | Total No. of Items |
| 017. Identify basic color qualities and color terms and combine colors which are pleasing together. | X | X | | | | |
| 018. Analyze specific customers to determine which apparel would be most appropriate, considering color, line, detail, pattern, and fabric texture. | | | X | | | |
| 019. Identify line types and purposes of line. | X | | | | | |
| 020. Identify terminology used to describe the line and detail of apparel. | X | | | | | |
| 021. Interpret the significance of structural and decorative design in relation to the selection and planning of fashion merchandise. | | X | | | | |
| 022. Identify basic textile fibers and weaves and describe wear and special care features. | X | | | | | |
| 023. Translate label information into selling points. | | | X | X | | |
| 024. Inform customers of appropriate care of items of apparel and accessories. | | | | X | | |
| 25. Recognize a complete fashion look that includes accessories such as shoes, bags, jewelry, gloves, scarves, or hats for women, and shoes, ties, jewelry, or other accessories for men. | | X | | | | |
| 026. Combine apparel and accessories to show the latest fashion trends. | | | | X | | |
| 027. Identify fashion items that are appropriate for different occasions such as formal wear, sports events, business meetings, etc. | | | | X | | |
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*LEVEL I - Recall, II - Comprehension, III - Application

COMPETENCY 017: Identify basic color qualities and color terms and combine colors which are pleasing together.

TEST ITEM 017-00-11

INSTRUCTIONS TO TEACHER: Reproduce the crossword puzzle and the statements for Down and Across. Have the students complete the puzzle without using any reference materials.

INSTRUCTIONS TO STUDENTS: Complete the crossword puzzle using the questions or complete or incomplete statements found in the Down and Across columns. Write the correct response in the spaces that are numbered to correspond with the question or statement. The same word may be used more than once.

TEST ITEM 017-00-11

## COLOR CROSSWORDS

DOWN:

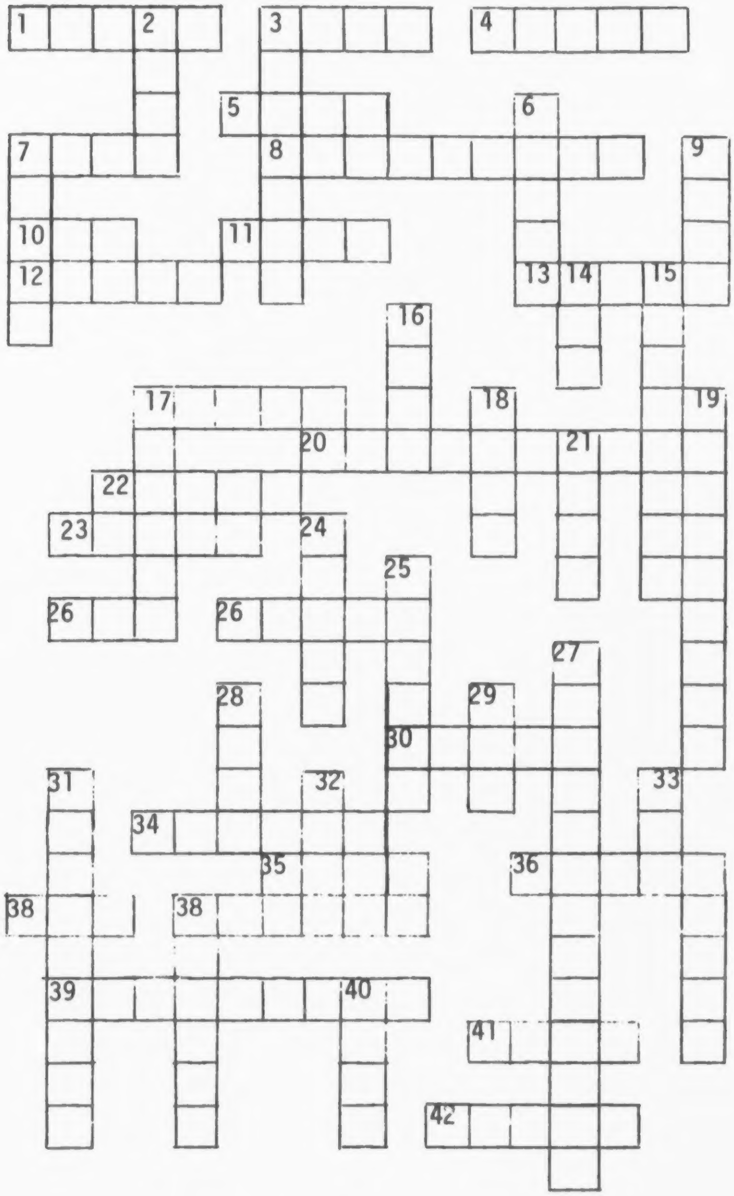
2. Created when equal amounts of black and white are added to a color.
3. Color scheme created by using three colors that form an equilateral triangle on color wheel.
6. Colors are effective ____ in sales promotion and advertising.
7. A shade of orange.
9. Use ____ color only on small areas.
14. Technical name for color.
15. In sales promotion, feature one ____color and use other colors as accents.
16. Yellow is a ____ color.
17. There are ___ basic colors on the color wheel.
18. A cool color.
19. Color is used to attract ____.
21. Black on yellow is ____ legible of all colors.
24. ____ provides psychological impact when used effectively.
25. A secondary color.
27. Color scheme that consists of tints, shades, and tones of one color.
28. In fabric, shaggy or nubby weaves cast shadows that tend to ____ color.
29. ____ is the color of action.
31. Refers to brightness or dullness.
32. Blue and green are ____ colors.
33. Color that is the greatest stimulator of our emotions.
37. In a triad color scheme, the three colors are ____ distances from each other.
38. Complement of yellow
40. A tone of red.

ACROSS:

1. Seen when all colors are reflected.
3. Mixture of white with pure color.
4. Seen when all colors are absorbed.
5. Color affects apparent ____.
7. A primary color.
8. Neighboring colors on color wheel.
10. Many variations can be made from ____ color.
11. A tint of red.
12. Basic colors are shown on a color ____.
13. Mixture of pure color and black.
17. Split-complementary color schemes have ____ colors.
20. The ___ of a color is the color opposite it on color wheel.
22. Red on green is ____ legible.
23. Amount of black or white in color.
26. Monochromatic color scheme consists of tones, tints, and shades of ____ ____ (two words).
30. A secondary color.
34. A cheerful color.
35. A double-split complementary color scheme has ____ colors.
36. Mixture of pure color and black.
38. Intermediate color (two-words).
39. Type of colors made by mixing equal amounts of two primary colors.
41. A neutral, not technically a color.
42. A ____ complementary color scheme has three colors in it.

TEST ITEM 017-00-11

## COLOR CROSSWORDS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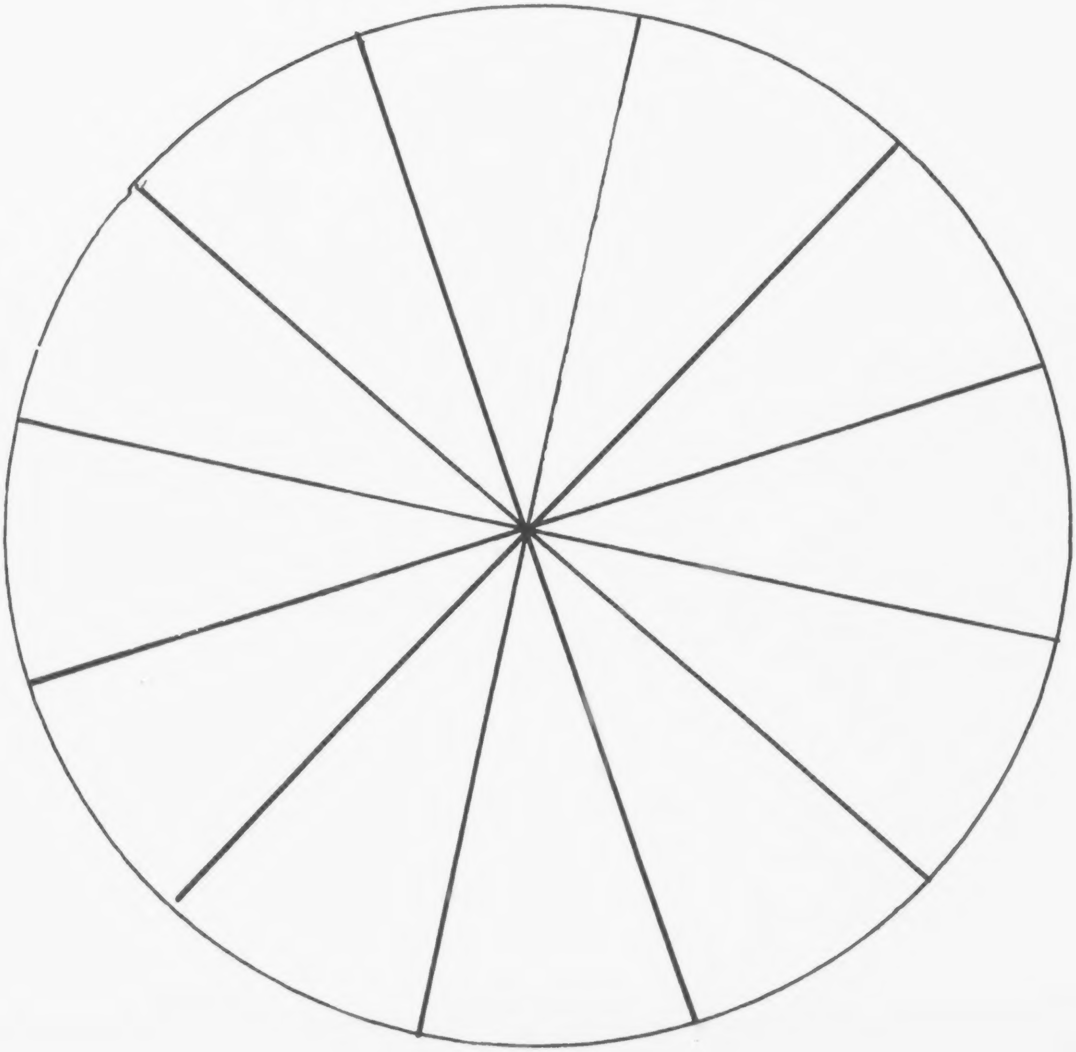
TEST ITEM 017-00-12

INSTRUCTIONS TO STUDENTS: Label the color wheel by writing the appropriate color name in the appropriate wedge on the color wheel below. The colors should appear in the correct order around the wheel.



TEST ITEM 017-00-13

INSTRUCTIONS TO TEACHER: Bring a fashion ensemble to class representing one of the seven color schemes. This ensemble should be placed in front of the class for identification. Provide crayons (or some other appropriate medium) and reproduce the two pages of fashion outfits provided. The students should color these outfits to represent the six remaining color schemes (eliminating the one that you have placed before them to be identified).

INSTRUCTIONS TO STUDENTS: First, identify the fashion ensemble that your instructor has presented to you according to the color scheme that it represents. Write the name of the color scheme in blank Number 1 below. Next, color the pictures of the six outfits that your instructor gives you. Each outfit should be colored to represent one of the six remaining color schemes (do not use the scheme that is being presented at the front of the classroom). Finally, label each of the color schemes that you used in the space provided below, corresponding to the numbers of the outfit. Under the name of the color scheme, write out the names of the colors that you used.

1. Color scheme presented to the class ______________________

2. Color scheme: ______________________

   Colors used: ______________________

3. Color scheme: ______________________

   Colors used: ______________________

4. Color scheme: ______________________

   Colors used: ______________________

5. Color scheme: ______________________

   Colors used: ______________________

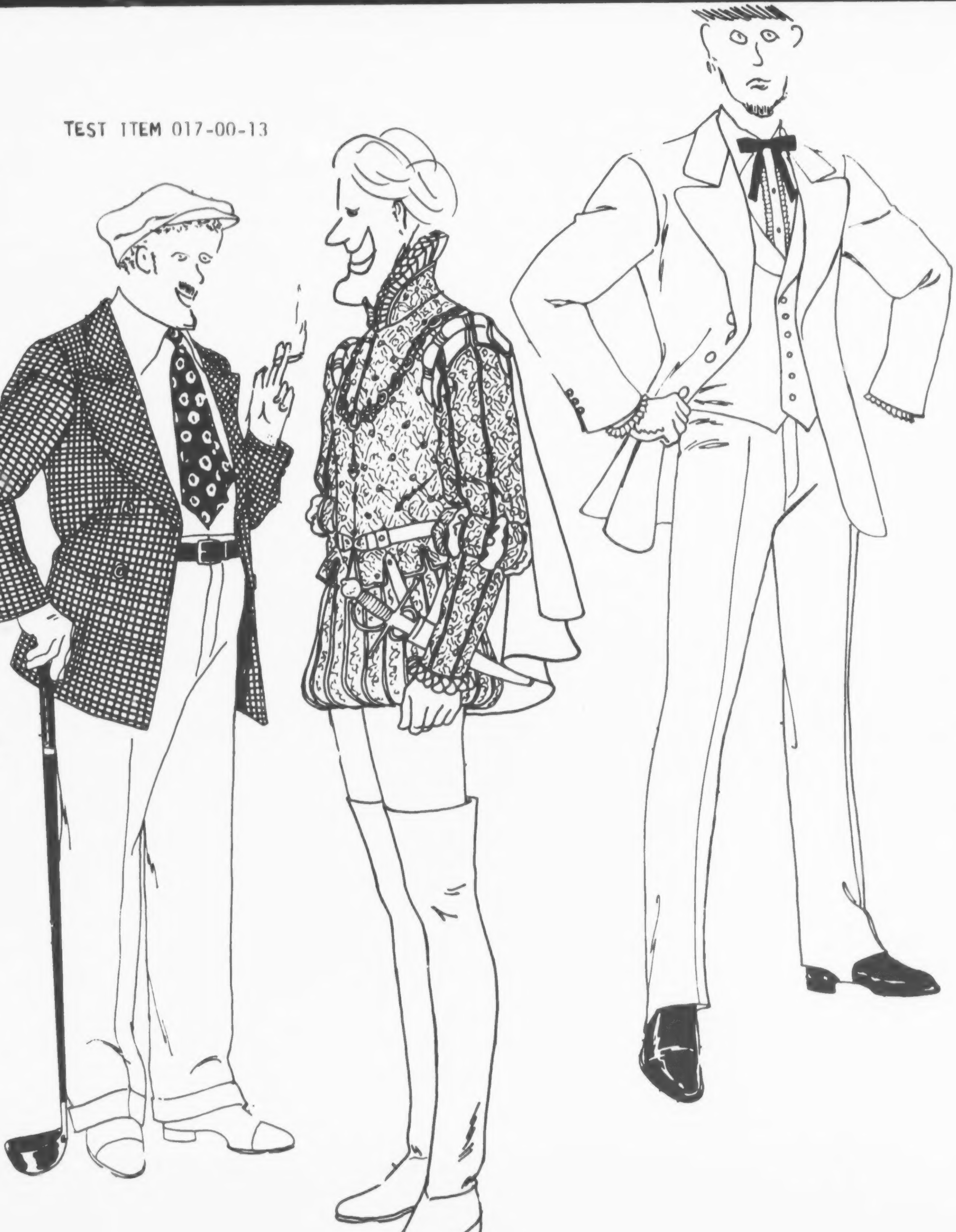
6. Color scheme: ______________________

   Colors used: ______________________

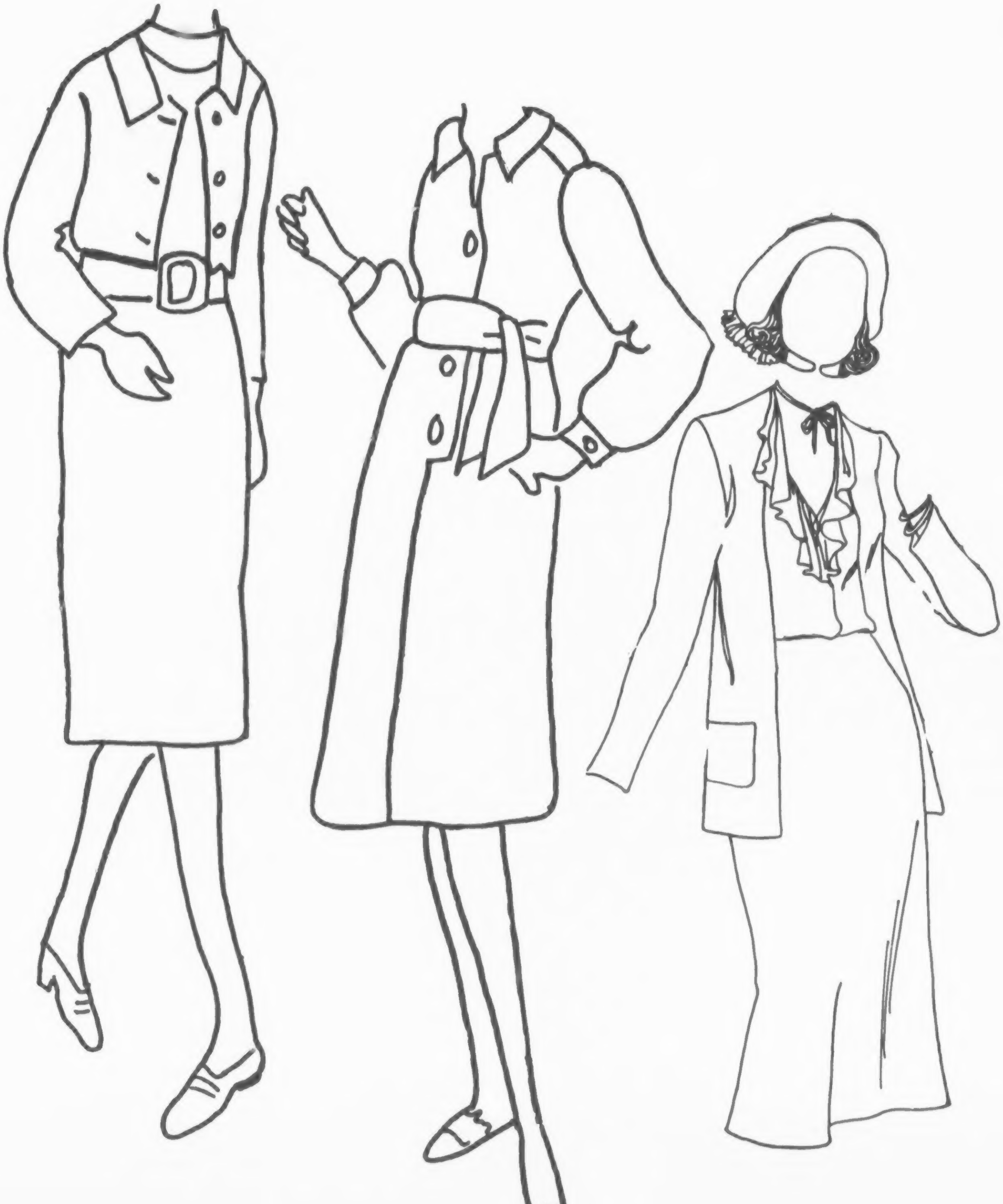
7. Color scheme: ______________________

   Colors used: ______________________

TEST ITEM 017-00-13



TEST ITEM 017-00-13



COMPETENCY 018: Analyze specific customers to determine which apparel would be most appropriate, considering color, line, detail pattern and fabric texture.

TEST ITEM 018-00-11

INSTRUCTIONS TO STUDENTS: Read each of the following incomplete sentences. Determine which of the possible completion choices is most appropriate for each statement. Circle the letter to this response.

1. A young lady with large hips will usually look best in:
   a. a yellow dirndl skirt.
   b. black slacks.
   c. red jeans.
   d. a white pleated skirt.
2. A person wishing to reduce their apparent size might wear a:
   a. blue suit.
   b. beige suit.
   c. red pants and shirt.
   d. white suit.
3. Very dark skin tones look best in:
   a. white.
   b. pastels.
   c. blacks and browns.
   d. jewel colors.
4. A good color choice for a redhead is:
   a. purple.
   b. green.
   c. red.
   d. bright yellow.
5. People with grey hair should avoid:
   a. vivid hues.
   b. blues.
   c. lavender.
   d. medium values.
6. A short man will look taller if he wears:
   a. navy sport coat with grey trousers.
   b. green plaid sport coat with green trousers.
   c. brown suit with beige shirt.
   d. pale yellow shirt and medium grey trousers.
7. A tall, heavy woman can minimize her weight by wearing:
   a. a pink dress with self belt.
   b. a beige skirt, brown blouse, multi-colored earthtone wide belt.
   c. a navy skirt, white blouse, navy vest.
   d. pale yellow skirt, with print blouse of yellow, green and blue.

COMPETENCY 019: Identify line types and purpose of lines.

TEST ITEM 019-00-11

INSTRUCTIONS TO STUDENTS: List the five major purposes of line as discussed in class and briefly explain each.

1.

2.

3.

4.

5.

**COMPETENCY 021:** Interpret the significance of structural and decorative design in relation to the selection and planning of fashion merchandise.

TEST ITEM 021-00-11

INSTRUCTIONS TO STUDENTS: Briefly tell the difference between structural and decorative design lines and give four examples of each in the space provided below.

Structural design lines ____________________________________________

Examples: (1)

(2)

(3)

(4)

Decorative design lines ____________________________________________

Examples: (1)

(2)

(3)

(4)

COMPETENCY 022: Identify basic textile fibers and weaves and describe wear and special care features.

TEST ITEM 022-00-11

INSTRUCTIONS TO STUDENTS: Read each of the following statements about the natural fibers. Write the correct response (true or false) in the blank to the left of each statement.

_____ 1. Wool is of vegetable origin.

_____ 2. The filling yarn is the lengthwise yarn in a woven fabric.

_____ 3. Cotton is static free.

_____ 4. Linen has little elasticity and therefore is resistant to wrinkling.

_____ 5. Silk is damaged by heat and sunlight.

_____ 6. Worsted wool fibers go through the extra processing step of combing.

_____ 7. Virgin wool is the strongest and most resilient of the wool classification.

TEST ITEM 022-00-12

INSTRUCTIONS TO STUDENTS: In Column I the natural fibers are listed. In Column II characteristics of natural fibers are listed. Match the characteristics of natural fibers to the most appropriate natural fiber. Record the letter(s) of your choice in the space provided to the left.

Column I

_____ 1. Cotton

_____ 2. Linen

_____ 3. Silk

_____ 4. Wool

Column II

a. Damaged by acids and perspiration.

b. Can have a soft bulky hand or a smooth, hard hand.

c. Wrinkles easily.

d. Dries slowly.

e. Has great resistance to heat.

f. Cool and absorbent fabric.

g. Fibers will matt and pill.

h. Very warm fiber.

i. Natural affinity for dyes.

j. Crisp, firm hand.

COMPETENCY 023: Translate label information into selling points.

TEST ITEM 023-00-11

INSTRUCTIONS TO STUDENTS: Read the following facts presented on the garment label and develop selling points accordingly.

85% cotton
15% polyester
Machine wash
Tumble Dry
Synthetic Cycle

COMPETENCY 024: Inform customers of appropriate care of items of apparel and accessories.

TEST ITEM 024-00-11

INSTRUCTIONS TO STUDENTS: Read the following case study and then instruct a customer on how to properly care for a newly purchased garment.

You are a sales associate in the children's department at Logan's Department Store. A young mother comes in to buy a woolen cap, mittens, and sweater for her one-year old child. The items she selects are all 75% wool, 25% acrylic. The label in the cap and sweater she selects reads "dry flat" and the mitten label reads "delicate cycle". The customer asks your advice about the appropriate care of the items.

TEST ITEM 024-00-12

INSTRUCTIONS TO STUDENTS: In Column I label instructions are listed. In Column II care techniques are listed. Match the care techniques to the appropriate label instructions. Record the letter of your choice in the space provided to the left.

Column I

_____ 1. Line dry

_____ 2. No chlorine bleach

_____ 3. Iron damp

_____ 4. Drip dry

_____ 5. No spin

Column II

a. Garment should be drycleaned only.

b. Hang wet and allow to dry with hand shaping only.

c. Use oxygen bleach.

d. Set iron at hot setting.

e. Hang damp and allow to dry.

f. Dampen garment before ironing.

g. Remove wash load before final machine spin cycle.

TEST ITEM 024-00-12

INSTRUCTIONS TO STUDENTS: In Column I label instructions are listed. In Column II care techniques are listed. Match the care techniques to the appropriate label instructions. Record the letter of your choice in the space provided to the left.

| Column I | Column II |
|---|---|
| _____ 1. Line dry | a. Garment should be drycleaned only. |
| _____ 2. No chlorine bleach | b. Hang wet and allow to dry with hand shaping only. |
| _____ 3. Iron damp | c. Use oxygen bleach. |
| _____ 4. Drip dry | d. Set iron at hot setting. |
| _____ 5. No spin | e. Hang damp and allow to dry. |
|  | f. Dampen garment before ironing. |
|  | g. Remove wash load before final machine spin cycle. |

COMPETENCY 025: Recognize a complete fashion look that includes accessories such as shoes, bags, jewelry, gloves, scarves or hats for women, and shoes, ties, jewelry, or other accessories for men.

TEST ITEM 025-00-11

INSTRUCTIONS TO STUDENTS: Read each of the following statements about a complete fashion look. Determine if each statement is true or false. Write the correct response (true or false) in the blank to the left of each statement.

_____ 1. Accessories are less important in today's fashion market than 20 years ago.

_____ 2. The fashion market dictates the importance of many fashion accessories.

_____ 3. Accessories help to achieve a "total look" which is important today.

_____ 4. Accessories provide a less expensive means of updating a wardrobe.

_____ 5. Today most people purchase accessories as impulse items.

_____ 6. The main reason for using accessories is to be fashionable.

COMPETENCY 026: Combine apparel and accessories to show the latest fashion trends.

TEST ITEM 026-00-11

INSTRUCTIONS TO STUDENTS: Read each of the following statements about combining apparel and accessories to show the latest fashion trends. Determine if each statement is true or false. Write the correct response (true or false) in the blank to the left of each statement.

_____ 1. Fashion trends often make a fashion statement and accessories help to define and accentuate a statement.

_____ 2. Combining apparel and accessories only depend a small part on what is fashionable at present; accessories stay consistent from year to year.

_____ 3. It is important to know information such as materials, construction, and care of apparel and accessory items.

_____ 4. Customers often need assistance in interpreting fashion trends.

_____ 5. Magazines, newspapers, and trade publications will help a salesperson become familiar with overall fashion trends.

_____ 6. In choosing a tie, men should harmonize the width of a tie with the width of the suit lapel.

TEST ITEM 026-00-12

INSTRUCTIONS TO STUDENTS: Write several paragraphs discussing current fashion trends. Include, in detail, accessories and how they are combined with apparel items to project a "total look". Be sure to mention trends in color, line, design, detail pattern, fabric texture. Remember that you should cover both men's and women's fashion. You will be rated on how well you cover each of the areas above.

INSTRUCTIONS TO TEACHER: Use this rating sheet to grade each student's work.

| RATING SHEET | A* | B | C | D | E |
|---|---|---|---|---|---|
| 1. Detailed examples given on combining apparel and accessories items. | 50 | 40 | 30 | 20 | 10 |
| 2. Colors discussed adequately. | 10 | 8 | 6 | 4 | 2 |
| 3. Lines discussed adequately. | 10 | 8 | 6 | 4 | 2 |
| 4. Design, detail pattern, and fabrics discussed in relation to apparel and accessory items. | 15 | 12 | 9 | 6 | 3 |
| 5. Men's and women's wear discussed. | 15 | 12 | 9 | 6 | 3 |

*(A= Excellent; B=Above Average; C=Average; D=Below Average; E=Poor)

COMPETENCY 027: Identify fashion items that are appropriate for different occasions such as formal wear, sports events, business meetings, etc.

TEST ITEM 027-00-11

INSTRUCTIONS TO STUDENTS: Based on your knowledge of current fashion trends and what is appropriate for different occasions, complete the following chart. You should choose one of the following occasions: football game, job interview at a department store, or formal reception. You may coordinate an outfit for either a male or female. Describe each article in detail (color, material, patterns, etc.). You should complete only those items below that apply to your particular occasion.

OCCASION:

MALE OR FEMALE:

HOW WOULD YOU CLASSIFY THIS OCCASION:
(Formal/ Dressy/ Business/ Casual/ Sporty)

ITEMS:

Hat or headpiece
Coat
Dress
Slacks
Skirt
Blouse or shirt
Jacket or sweater
Jewelry
Hosiery
Shoes
Handbag
Other accessories

TEST ITEM 027-00-12

INSTRUCTIONS TO STUDENTS: Mr. and Mrs. Hanson have walked into your store to purchase outfits for next weekend. They will be attending a football game and a cocktail party at a state university. They are in their twentys and both have good jobs. Coordinate one outfit for Mr. Hanson and one outfit for Mrs. Hanson. You may choose different events or the same event for both. Be sure to completely describe the outfit in terms of silhouette, colors, fabrics, and design. Accessorize completely. If you wish, you may use sketches, but that is completely optional.

# TEST ITEM KEYS

### 017-00-11

**Across**

1. White
3. Tint
4. Black
5. Size
7. Blue
8. Analogous
10. One
11. Pink
12. Wheel
13. Shade
17. Three
20. Complement
22. Least
23. Value
26. One Color
30. Green
34. Yellow
35. Four
36. Shade
38. Red Violet
39. Secondary
41. Gray
42. Split

**Down**

2. Tone
3. Triadic
6. Tools
7. Brown
9. Pure
14. Hue
15. Dominant
16. Warm
17. Twelve
18. Blue
19. Attention
21. Most
24. Color
25. Orange
27. Monochromatic
28. Dull
29. Red
31. Intensity
32. Cool
33. Red
37. Equal
38. Violet
40. Rose

### 017-00-12

Beginning with the primary color yellow, colors on the color wheel should lie next to each other as given below:

1. Yellow
2. Yellow-Green
3. Green
4. Blue-Green
5. Blue
6. Blue-Violet
7. Violet
8. Red-Violet
9. Red
10. Red-Orange
11. Orange
12. Yellow-Orange

### 017-00-13

Teacher discretion.

### 018-00-11

1. B
2. A
3. D
4. B
5. A
6. C
7. C

### 019-00-11

1. Gives direction - leads the eye in vertical horizontal or diagonal directions which can create optical illusions and thus changing apparent body size.
2. Outlines shape - gives shape to a garment - the silhouette
3. Divides space - lines break up a garment into parts such as collars, bodice, skirt or pants, sleeves, etc. In costume design uneven spacing is desirable (3 to 5 to 8).
4. Connects parts - a belt seems to connect a bodice to a skirt.
5. Suggests movement - leads the eye through an outfit--example: a row of buttons causes one to look down the row.

### 021-00-11

Structural design lines are lines formed by the way the garment is constructed (pattern) and the fabric used.

(1) necklines (2) sleeves (3) hem line (4) any seam line (5) waist line

Decorative design lines are lines that are formed by applying trim or other decoration to the surface of the garment.

(1) buttons (2) lace (3) beading (4) braid (5) other trims

### 022-00-11

1. False
2. False
3. True
4. False
5. True
6. True
7. True

### 022-00-12

1. e,f
2. c,f,j
3. a,i
4. b,d,g,h

### 023-00-11

Teacher Discretion.

Selling Points: Cotton is colorfast; cotton is cool; cotton is static free; cotton is a very strong and durable fiber; cotton and polyester blends well. In this case you have the advantages of both cotton and polyester which lessens the disadvantages present in a garment made of 100% cotton or 100% polyester. Cotton and polyester can be machine washed and tumble dried. 100% cotton wrinkles badly but polyester is very wrinkle resistant. 100% cotton shrinks when first washed, polyester does not shrink. Cotton and polyester can withstand repeated washings.

### 024-00-11

Teacher Discretion.

Facts about the Cap and Sweater: "dry flat" and 75% wool and 25% acrylic

1. Wash by hand using cool to lukewarm water.
2. Use neutral, non alkali soap or detergent.
3. Absorb excess moisture with towel.
4. Allow to dry at room temperature lying flat on counter, table, etc.

Facts about the Mittens: delicate cycle and 75% wool and 25% acrylic

1. Wash in washing machine on gentle/delicate cycle or handwash.
2. Wash in cool to lukewarm water.
3. Wash with neutral, non-alkali soap.
4. Allow to dry at room temperature.

### 024-00-12

1. e
2. c
3. f
4. b
5. g

### 025-00-11

1. False
2. True
3. True
4. True
5. False
6. False

026-00-11

1. True
2. False
3. True
4. True
5. True
6. True

026-00-12

Teacher should rate each written entry according to the rating sheet. There is a possibility of 100 points.

027-00-11

Teacher will determine the evaluation based on what is current and acceptable, according to the guidelines given to the student.

027-00-12

Teachers must use own judgment. Below are questions to be used as a guideline.

1. Is outfit appropriate for the climate?
2. Is the outfit appropriate for the age group and socioeconomic class of the Hansons?
3. Are colors, fabrics, designs, and silhouette appropriate?
4. Are outfits accessorized?
5. Does the overall outfit give a "total look" according to today's fashion trends?

# PRINTED REFERENCES

## PRINTED REFERENCES FOR MERCHANDISE INFORMATION FOR FASHION MERCHANDISING

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# TABLE OF CONTENTS FOR PERSONAL SELLING

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| COMPETENCY STATEMENT | 7271 | C | S | CO |
|---|---|---|---|---|
| I. Overview of Selling | | | | |
| A. Importance of Selling to Merchandising | | | | |
| B. Personal Requirements | | | | |
| 028 Convey a positive image of self and the firm.<br>The student will demonstrate an understanding of the character traits, moral attitudes, and personal habits needed by salespersons.<br>The student will explain the importance of conveying a positive image of self and the firm.<br>The student will identify ways a salesperson can convey a positive image of self and/or the firm. | X | | | X |
| C. Customer Types and Buying Motives | | | | |
| 029 Treat others as individuals.<br>The student will describe the general types of customers.<br>The student will provide descriptive methods for dealing with the various customer moods/personalities.<br>The student will differentiate between rational and emotional buying motives.<br>The student will analyze customer purchases to determine buying motive.<br>The student will list the five buying decisions which every prospect makes when considering a purchase.<br>The student will demonstrate his/her ability to treat each customer as an individual by role-playing a sales situation. | X | | | X |
| Selling Process | | | | |
| A. Approach the Customer and Determine His/Her Needs | | | | |
| 030 Utilize appropriate sales approaches.<br>The student will define the term "approach."<br>The student will list the three goals of an approach.<br>Given the type of customer, the student will identify at least one suitable type of approach to be used.<br>In given situations, the student will select the appropriate opening statement and justify the selection.<br>The student will explain when to approach the customer and what approach to use. | X | X | | |
| 031 Identify and analyze customer's needs relative to apparel and accessories.<br>The student will list and explain techniques to use in identifying and analyzing a customer's needs.<br>The student will ask purposeful and meaningful questions to determine a customer's needs. | X | X | | |
| 032 Observe customer's outward appearance, expression, and manner to determine appropriate size, style, color, and pattern preferences.<br>The student will identify observation techniques which could be used during a sales presentation.<br>The student will discuss the importance of observing the customer's appearance, expression and manner.<br>The student will list the factors that should be considered in observing the customer's appearance, expression, and manner.<br>The student will analyze basic figure types.<br>The student will determine appropriate and inappropriate clothing and accessory styles, fabric textures, and pattern types for basic figure styles. | X | | | X |

| COMPETENCY STATEMENT | 7271 | C | S | CO |
|---|---|---|---|---|
| 033 Ask pertinent questions to identify more clearly customer needs, wants, interests, etc.<br>The student will identify questioning techniques which could be used during a sales presentation.<br>The student will explain the importance of getting merchandise into the customer's hands during the questioning process.<br>Using a role-playing situation, the student will demonstrate the techniques of asking pertinent questions to identify more clearly customer needs, wants, and interests. | X | | | X |
| B. Present the Merchandise | | | | |
| 034 Demonstrate merchandise by getting it into customer's hands, having them try it on, etc., to create desire and attachment to the item.<br>The student will identify the purpose of the presentation.<br>The student will discuss the features of the presentation.<br>The student will give reasons for having the customer participate in the demonstration.<br>The student will demonstrate the techniques of involving the customer in the presentation. | X | X | | |
| 035 Compare prices and price lines for customers for items of apparel and accessories.<br>The student will use proper terminology when referring to lower priced merchandise.<br>The student will explain the difference between similar items of merchandise sold at different prices or price lines.<br>The student will justify prices to himself/herself and to the customer. | X | | | X |
| 036 Inform customers of substitute merchandise if requested items are unavailable.<br>After determining the customer's need for the requested item, the student will recommend a similar item that fits the need.<br>The student will explain the relationship between the desired item and the substitute.<br>The student will rank in sequential order the steps involved in informing customers of substitute merchandise. | X | X | | |
| C. Overcome Objections | | | | |
| 037 Justify price of an item in terms of merchandise features and benefits.<br>The student will identify ways of justifying price.<br>Given a specific item and its features and a customer's need for the item, the student will justify its price in terms of features and benefits. | X | | | X |
| 038 Tactfully handle difficult customers.<br>The student will identify characteristics of difficult customers.<br>The student will identify ways to handle difficult customers.<br>Using a role-playing situation, the student will demonstrate the techniques of using tact and respect toward the customer. | X | | X | |
| 039 Anticipate and/or resolve customer objections.<br>The student will distinguish the difference between an objection and an excuse.<br>The student will classify general types of objections by category or example.<br>The student will identify techniques for handling objections.<br>Using a role-playing situation, the student will demonstrate his/her ability to anticipate and/or resolve customer objections. | X | X | | |

| COMPETENCY STATEMENT | 7271 | C | S | CO |
|---|---|---|---|---|
| D. Close the Sale | | | | |
| 040 Obtain agreement and commitment from the customer.<br>The student will define the close of the sale.<br>The student will identify ways to assist the customer in making a buying decision.<br>The student will identify types of buying signals.<br>The student will explain the procedure to use for a trial close.<br>The student will identify the basic closing techniques.<br>Using a role-playing situation, the student will use the proper techniques of closing a sale. | X | X | | |
| 041 Thank customers to encourage repeat business.<br>The student will explain the importance of thanking the customer.<br>Given specific sales situations, the student will develop and use appropriate departure statement. | X | X | | |
| E. Suggestion Selling and Building Clientele | | | | |
| 042 Suggest related items, accessory items, etc., to obtain multiple sales.<br>The student will explain the importance of suggestion selling.<br>The student will define suggestion selling.<br>The student will list techniques for making suggestions.<br>Using a role-playing situation, the student will use suggestion selling. | X | X | | |
| 043 "Trade-up" when the opportunity arises, pointing out additional features and benefits in the better merchandise.<br>The student will define "trading-up."<br>The student will identify the techniques used when "trading-up." | X | | X | |
| 044 Maintain customer card file or clientele book to encourage repeat business.<br>The student will identify techniques that can be used in building clientele.<br>The student will identify the kinds of information which should be recorded in a customer card file or clientele book.<br>The student will identify proper uses of a customer card file or clientele book. | X | | | X |
| III. Sales Related Activities. | | | | |
| A. Cash and Charge Transactions | | | | |
| 045 Process charge or cash transactions.<br>The student will define terms related to charge and cash transactions.<br>The student will identify in sequence, the procedures for recording charge or cash transactions.<br>Given case situations, the student will process charge and cash transaction sales forms. | X | X | | |
| 046 Accurately calculate the exact amount of a customer's purchase.<br>The student will extend sales slip entries.<br>The student will determine the amount to be charged for multiple-priced items when fewer than the multiple-priced number are purchased.<br>The student will compute sales tax manually and by using a tax chart.<br>The student will subtotal and total the sales form.<br>Given a case situation involving several purchases, the student will accurately calculate the exact amount of the customer's purchase. | X | X | | |

| COMPETENCY STATEMENT | 7271 | C | S | CO |
|---|---|---|---|---|
| 047 Accurately compute employee discounts, delivery charges, alteration charges, layaway charges, etc., when writing out saleschecks. | X | X | | |
| The student will compute employee discounts. | | | | |
| The student will compute delivery charges. | | | | |
| The student will compute alteration charges. | | | | |
| The student will compute layaway charges. | | | | |
| 048 Write saleschecks legibly so that error in delivery, quantities sent, and amounts charged can be eliminated. | X | | | X |
| The student will identify the common mistakes made in writing saleschecks. | | | | |
| The student will explain the importance of writing saleschecks legibly and accurately. | | | | |
| The student will identify the techniques to use in writing saleschecks legibly. | | | | |
| Given a case problem and a blank sales check, the student will be able to write a salescheck legibly and accurately. | | | | |
| B. Layaway | | | | |
| 049 Process layaways. | X | | X | |
| The student will identify the factors involved in layaway sales. | | | | |
| The student will give reasons for using layaway. | | | | |
| The student will explain the advantages of layaway for the customer and the store. | | | | |
| Given necessary forms and transaction information, the student will process layaways. | | | | |
| C. Refunds and Exchanges | | | | |
| 050 Make refunds or exchanges on return merchandise in accordance with company policy. | X | X | | |
| The student will list examples of company policies regarding refunds or exchanges on return merchandise. | | | | |
| The student will identify possible reasons for adjustments. | | | | |
| The student will identify and define the different types of adjustments and explain how to handle each. | | | | |
| Given case situations, the student will process refunds or exchanges on return merchandise. | | | | |
| D. Gift Certificates and Special Orders | | | | |
| 051 Write gift certificates and special orders. | X | | | X |
| The student will explain the use of a gift certificate. | | | | |
| The student will explain the use of want slips and special order requests. | | | | |
| Given necessary forms and a case problem, the student will write a gift certificate. | | | | |
| Given necessary information and a case problem, the student will complete want slips and/or special order requests. | | | | |

| COMPETENCY STATEMENT | 7271 | C | S | CO |
|---|---|---|---|---|
| E. Telephone Sales | | | | |
| 052 Sell merchandise over the telephone.<br>The student will identify the types of telephone selling.<br>The student will demonstrate an understanding of proper telephone personality.<br>The student will identify and explain the use of telephone selling rules.<br>Using a case problem, the student will record necessary information on a telephone order form.<br>The student will analyze a telephone sales conversation to point out mistakes and suggest improvements.<br>Using a role-playing situation, the student will sell merchandise over the telephone. | X | X | | |
| F. Other Sales Related Activities | | | | |
| 053 Sell to customers in a self-service store while performing regular storekeeping duties.<br>The student will identify self-service techniques.<br>The student will compare the principles of selling performed by a salesperson in a full-service store with those accomplished by display materials in a self-service store.<br>The student will identify regular and selling duties of self-service personnel.<br>Using a role-playing situation, the student will demonstrate the techniques of self-service selling. | X | | | X |
| 054 Work with more than one customer simultaneously in a courteous manner.<br>The student will explain rules for working with more than one customer simultaneously.<br>Using a role-playing situation, the student will analyze a case problem and apply techniques for effectively dealing with more than one customer. | X | | | X |

PLANNING NOTES

## I. Overview of Selling

A. Selling is important to merchandising. (HO-1)

1. Salesmanship is the persuading of a prospective customer to buy a product, idea, or service.
    - a. Personal selling is when the selling process takes place between two people.
    - b. Impersonal selling is advertising, displays, and other promotions.
2. Selling is providing service, persuasion, communication, problem-solving and education.
3. Salespeople are important.
    - a. Salespeople sold American people the idea of democracy.
    - b. Salespeople raised the standard of living by making mass production possible, which lowered prices and enabled more people to buy.
    - c. Salespeople helped create demand for new inventions, new products, etc.
    - d. Salespeople built America because they served America; selling is serving.
    - e. Salespeople serve America today.
        - (1) Salespeople make jobs for others. It is estimated that 33 people work to produce the goods sold by one salesperson.
        - (2) Salespeople continue to improve the standard of living in this country. These people offer us new ideas and methods for doing business better and living better lives. (SA-1; PR-9)(HO-2)

B. Selling requires certain personal requirements. (HO-3, HO-4)

1. Personality is defined as the sum total of all mental and physical traits that set an individual apart from the other people in the world.
    - a. Native personality is the natural way of conducting oneself among friends and family.
    - b. Professional personality is a cultivated or developed manner to use for business purposes.
2. Sales personality is defined as those characteristics or traits that contribute to success in selling. (SA-2; PR-1)
    - a. Sales personality includes character traits:
        - (1) Self-confidence is a belief in oneself, in the product being sold, and in the business one represents;
        - (2) Friendliness is greeting customers with a smile and a sincere interest in them;
        - (3) Cheerfulness includes a sense of humor;
        - (4) Courtesy is showing respect, consideration, and willingness to cooperate;
        - (5) Tact is saying and doing the right thing at the right time--
            - (a) Using confidentiality;
            - (b) Avoiding gossip and rumors;
            - (c) Being truthful to customers courteously.
    - b. Sales personality includes moral attitudes:
        - (1) Loyalty is faithfulness to company, people, or ideas;
        - (2) Honesty is fairness and truthfulness--
            - (a) Avoiding wasting company time;
            - (b) Avoiding "stealing" company merchandise;
            - (c) Avoiding telling half-truths about merchandise, etc;
        - (3) Dependability is doing one's job as it should be done.
    - c. Sales personality includes personal habits which are behavior patterns acquired by repetition:
        - (1) Enthusiasm is a positive approach with genuine interest;
        - (2) Initiative is accepting new responsibility on one's own and carrying it through;
        - (3) Alertness is awareness;
        - (4) Poise is controlling one's emotions.
3. Human relations is getting along with others.

PLANNING NOTES

4. Public relations is what people think about an employee and his/her business, what people say about the business because of what the employees and the business have done to or for the people.

(SA-3)

a. Public relations activities occur in such areas of a store as:

(1) Customer relations,
(2) Store appearance,
(3) Facilities,
(4) Customer services,
(5) Check cashing,
(6) Community relations,
(7) Store sponsored activities, or
(8) Employee relations.

b. Each salesperson has personal tools for public relations:

(1) A head,
(2) A smile,
(3) A voice,
(4) A pair of hands,
(5) A telephone,
(6) A feeling for people,
(7) A feeling for the merchandise.

5. A successful salesperson must use his/her public relations tools to convey a positive image of self and the firm.

(SA-4)
[CTIB 028-00-11]
[CTIB 030-00-14]

C. Customer types and buying motives must be considered.

1. Customer types.

a. The decided customer.

(1) Characteristics:

(a) Knows what he/she wants to buy;
(b) Is positive in his/her movements;
(c) Is well informed upon arrival.

(2) How to handle:

(a) Give immediate and friendly assistance;
(b) Do not rush, this customer wants to make the decision after considering all facts.

b. The undecided customer.

(1) Characteristics:

(a) Does not know what to buy;
(b) Needs the salesperson's help in making up his/her mind.

(2) How to handle:

(a) Do not confuse--show only a few items;
(b) Question about needs, likes, dislikes, and use of the item;
(c) Select one or two products he/she likes;
(d) Make positive statements about the product;
(e) Offer one course of action and assume he/she has made a decision.

c. The "just-looking" customer.

(1) Characteristics:

(a) Is the most difficult to sell;
(b) May be a casual looker who really has nothing particular in mind.

(2) How to handle:

(a) Question to bring out desire for a particular product or service;
(b) Let the customer look but do not forget him/her;
(c) Wait to approach again until customer indicates interest in an item and looks around for a salesperson.

2. Customer Moods/Personalities.

a. The talkative customer.

(1) Allow him/her to talk while you listen with interest;
(2) Keep conversation centered on merchandise.

PLANNING NOTES

b. The silent customer.

(1) Demonstrate merchandise;
(2) Ask questions about merchandise which require more than a yes or no answer.

c. The customer in a hurry.

(1) Serve quickly;
(2) Demonstrate briefly;
(3) Ask few questions;
(4) Be considerate of customer's time.

d. The tired customer.

(1) Be calm and sympathetic;
(2) Use courtesy and tact.

e. The suspicious customer.

(1) Use patience and frankness;
(2) Explain merchandise selling points carefully;
(3) Avoid a defensive approach but offer proof of reliability of firm or merchandise if necessary.

f. The leave-me-alone customer.

(1) Let the customer browse alone;
(2) Attempt to build goodwill.

g. The friendly customer.

(1) Give needed information;
(2) Talk with, not at, the customer.

h. The disagreeable or argumentative customer.

(1) Do not argue;
(2) Agree with minor points;
(3) Base presentation on agreement.

i. The foreign language customer.

(1) Do not panic; call for assistance;
(2) Use hand movements if necessary;
(3) Be friendly, considerate, and polite.
(4) Everyone understands a friendly smile and pleasant facial expression.

3. Buying motives.

a. All items are bought because of a need or want (desire).

(1) A need is something a person requires to survive.
(2) A want fulfills a function other than a need.

(HO-5)

b. Decisions to buy are influenced by reason and emotion.

(1) Rational (reason) motives are involved when the advantages of buying a product appeals to a person's reason or judgment.

(a) Efficiency
(b) Economy
(c) Good workmanship
(d) Durability
(e) Dependability
(f) Saving of time
(g) Adaptability to many uses
(h) Saving of space
(i) Automatic operation
(j) Ease of repair
(k) Ease of installation
(l) Increased production

(2) Emotional motives are involved when the item is purchased because of the appeal to an emotion.

(a) Love
(b) Fear
(c) Pride
(d) Prestige
(e) Better health
(f) Poise
(g) Social approval

- (h) Popularity
- (i) Comfort
- (j) Romance
- (k) Companionship
- (l) Protection of family or loved ones
- (m) Pleasure
- (n) Amusement
- (o) Security
- (p) Adventure
- (q) Pride of ownership

c. Reason and emotion may conflict in the customer's mind. (TM-1)

d. Every prospect makes five buying decisions when considering a purchase:

- (1) Why should I buy? In order to answer this question, the customer must be convinced that he/she has a need for some item.
- (2) What type, brand, or style should I buy? The customer will gather facts about the product from sources such as newspapers, friends, magazines, or salespersons to help make decisions about the features of each type, brand, or style he/she plans to purchase.
- (3) Where should I buy? Patronage buying motives deal with the selection of one business firm over another (assortment offered, price, convenience, seller's reputation, service offered).
- (4) How much should I pay? (Price) The customer will decide how much he/she can afford to spend on this purchase and allocate it for that purpose.
- (5) When should I buy? The customer decides whether to purchase now or later, or determines the best terms on which to purchase the merchandise.

e. In general, there are five major buying motives:

- (1) Health and safety
- (2) Comfort and convenience
- (3) Affection
- (4) Pride
- (5) Economy

f. Buying motives associated with fashion apparel are:

- (1) Social approval
- (2) Distinctiveness
- (3) Conformity
- (4) Variety
- (5) Practicality

g. The salesperson can learn about customer buying motives by:

- (1) Observing all his/her customers and the types of merchandise they purchase;
- (2) Listening to the comments of each customer;
- (3) Leading the customer to talk about the use of the merchandise he/she is buying;
- (4) Learning not to think in terms of his/her own likes and dislikes or budget.

4. Customers as Individuals.

a. Be able to identify customer types, moods and personalities and the ways to deal effectively with each.
b. Be able to detect customer buying motive and appeal to that motive. (TM-2)(TM-3)
c. Think of each customer from his/her point of view; develop empathy (the ability to put yourself in the other person's place).
d. Realize that each customer:

- (1) Occupies several roles throughout life;
- (2) Is part of a distinct social setting;
- (3) Is affected by social forces that may make his/her behavior acceptable or unacceptable;
- (4) Stores attitudes and knowledge gained from the various roles he/she has performed. (SA-5; PR-9)

e. Learn to formulate responses consistent with the customer's attitudes, roles, knowledge, and the social forces affecting him/her. [CTIB 029-00-11]

PLANNING NOTES

II. The Selling Process (AIDA--Attention, Interest, Desire, Action)

- A. Approach the customer and determine his/her needs.
  - 1. Utilize appropriate sales approaches. (SA-6)
    - a. The approach is the opening of the sale and the prelude to the presentation. (TM-4)
    - b. The purpose of the approach is to gain the customer's attention and to interest the customer immediately in the product or service. (TM-5)
    - c. The goals of the approach are:
      - (1) To show interest in the customer;
      - (2) To give promptness in serving the customer;
      - (3) To develop self-confidence in the salesperson's ability. (SA-7; PR-1)
    - d. The salesperson should display a positive attitude and a smile when the approach is made in order to:
      - (1) Gain the customer's attention and let him/her know you are aware of their presence;
      - (2) Create a favorable impression toward himself/herself and the business;
      - (3) Put the customer at ease and make him/her feel welcome;
      - (4) Put emphasis on the importance of the customer;
      - (5) Develop customer confidence in the salesperson;
      - (6) Direct customer attention to the merchandise;
      - (7) Set the stage for the presentation;
      - (8) Give the salesperson an opportunity to start analyzing the type of customer and his/her motives. (TM-6)
    - e. Factors in developing a good approach include:
      - (1) Promptness which gains attention and develops favorable store image:
        - (a) Smile;
        - (b) Acknowledge presence of customer;
        - (c) Never finish stock work or personal chores first--the customer feels ignored after the first ten seconds.
      - (2) Addressing the customer:
        - (a) Use a pleasant voice;
        - (b) Use clarity of voice;
        - (c) Use eye contact;
        - (d) Use correct grammar;
        - (e) Avoid slang words;
        - (f) Use descriptive language to make merchandise appealing.
      - (3) Appearance:
        - (a) Wear appropriate attire;
        - (b) Wear name badge if required;
        - (c) Be clean and well groomed.
      - (4) Attitude:
        - (a) Have a positive attitude;
        - (b) Exhibit a feeling of pride in the job, the merchandise, and the company.
      - (5) Posture:
        - (a) Stand and walk erect;
        - (b) Show self-confidence through posture.
      - (6) Facial expressions:
        - (a) Smile;
        - (b) Show enthusiasm toward customer.
    - f. Types of approaches include:
      - (1) The merchandise approach--

        Example: (To a customer looking at turtleneck sweaters)
        "Turtlenecks are very fashionable this year."

        - (a) Is considered most effective in terms of sales;
        - (b) Can be used when the customer is already looking at the merchandise;
        - (c) Directs or intensifies the customer's attention and interest in the merchandise;
        - (d) Requires the salesperson to be aware of merchandise features and their benefits to the customer.

(2) The service approach--

Example: "May I assist you with a certain size?"

(a) Is most used but probably least effective;
(b) Is least effective because it encourages negative responses;
(c) Offers assistance to the customer;
(d) Is most effective when salesperson avoids "May I help you?" or similar questions which can be answered with no;
(e) Is best for customers in a hurry who obviously need assistance.

(SA-8)

(3) The personal approach--

Example: "Good morning, Mr. Williams. I heard your daughter will soon graduate, and we have some great graduation gift ideas."

(a) Uses the customer's name;
(b) May use "sir," "madam," or "miss";
(c) Refers to a specific recent event if one is known;
(d) Is sincere; creates a friendly atmosphere and builds goodwill.

(4) The welcome, acknowledgement, or greeting approach--

Example: "Good morning, I'll be with you in a minute." -or- "Good morning, welcome to Logan's."

(a) Is an informal way to let the customer know you are aware he/she is there;
(b) Is used to acknowledge arrival of customer when you are already busy with another customer;
(c) Creates a friendly, positive atmosphere.

(5) The question approach--

Example: "Good morning, Mr. Jones. Would you like to try the new collar style?"

(a) Gains prospects attention;
(b) May imply a challenge through the question.

(6) The curiosity approach--

Example: "Did you know that this new hemline is in this year?"

(a) Is excellent for unused product;
(b) Holds attention long enough to get into presentation.

(7) The special interest approach--

Example: "Mrs. Kirby, I noticed that you go to all the football games and thought you might be interested in a short jacket."

(a) Establishes common ground with customer;
(b) Gains favorable attention.

(8) The gift approach--

Example: "Good afternoon, Mrs. Gray. I'm Sam Rodgers with Logan's and I'd like to give you this personalized pad with our compliments and show you our new location."

(a) Makes customer feel obligated at least to listen;
(b) Is best when gift is inexpensive, not a bribe.

(9) The referred lead approach--

Example: "Mr. Jackson, I'm Jane Todd. Mrs. Patrick from your parent company suggested I call you."

(a) Is one of the most effective openings;
(b) Gets attention quickly.

(10) The exhibit approach--

Example: "Mr. Williams, the shoe exhibit you're looking at shows the excellent arch construction of Logan's Sofstep shoe."

(a) Uses charts, models to get attention;
(b) Encourages participation quickly.

PLANNING NOTES

g. Avoid negative approaches such as:

(1) Questions which can be answered with no (Example: "May I help you?");
(2) Implications of working on commission (Example: "Is someone helping you?");
(3) Terms of endearment or insincerity (Example: "Good morning, dearie.");
(4) Reference to price (Example: "This robe is $29.95.");
(5) Reference to larger sizes (Example: "The larger sizes are on this rack.");
(6) Personal preferences (Example: "This is the best looking suit in the store.").

h. Approaches for types of customers include:

(1) Just-looking customer--merchandise, greeting, personal;
(2) Talkative customer--greeting, merchandise, personal;
(3) Silent customer--merchandise, greeting;
(4) Undecided customer--greeting, personal, merchandise;
(5) Decided customer--service, greeting;
(6) Hurried customer--service.

(HO-6)(SA-9; PR-9)(SA-10)
(PR-12)
[CTIB 030-00-11]
[CTIB 030-00-12]
[CTIB 030-00-13]
[CTIB 030-00-14]
[CTIB 030-00-15]

2. Identify and analyze customer needs.

a. Observe the customer accurately.

(1) Notice size--small, medium, large.
(2) Notice appearance--insight into style preference.
(3) Notice mannerisms (hurried or relaxed)--tune into customer mood.

b. Listen to the customer.

(HO-7)(TM-7)

(1) Listen to determine quality, quantity, color, size, price.
(2) Hear what the customer says--may offer information without being asked.

(SA-11; PR-9)

c. Ask questions.

(1) If information is not volunteered, ask questions to determine:

(a) Size;
(b) Price;
(c) Style;
(d) Color;
(e) Quantity.

(2) Get a complete picture of customer wants.
(3) Courteous questions show motives for buying.

d. Choose the selling point that best fits the customer's motive--observe facial expressions.

(1) Talk about customer's pleasure, comfort, profit, pride.
(2) Show you are interested.

(SA-12; PR-9)(SA-13)
[CTIB 031-00-11]
[CTIB 031-00-12]
[CTIB 030-00-14]

3. Observe customer's outward appearance, expression, and manner to determine appropriate size, style, color, and pattern preferences.

(SA-14; PR-5)

a. Use proper observation techniques:

(1) Watch for what the customer is looking at;
(2) Observe what merchandise the customer handles;
(3) Study the customer; gather information which might help bring the sale to a close;
(4) Do not appear to be snooping;
(5) Know when the customer appears to be looking for more specific articles.

b. Properly use appearance observations:

(1) Do not prejudge by outward appearance--the customer may be able to afford more than appearance indicates or may select lower priced item because it is suitable for occasion.

- (2) Determine basic figure types:
  - (a) Short and heavy;
  - (b) Short and thin;
  - (c) Tall and heavy;
  - (d) Tall and thin.
- (3) Determine size range that matches customer figure type:
  - (a) Misses sizes;
  - (b) Junior sizes;
  - (c) Women's sizes;
  - (d) Women's half sizes;
  - (e) Misses petite sizes;
  - (f) Men's suits, sport jackets, coats--short, regular or long;
  - (g) Men's slacks--waist and inseam sizes;
  - (h) Dress shirts--neck measurement and sleeve length;
  - (i) Sport shirts--small, medium, large.
- (4) Determine style to match figure type:
  - (a) Design;
  - (b) Proportion;
  - (c) Line.
- (5) Select color to match skin and hair coloring.
- (6) Select pattern and texture to match figure type and style.

(SA-15; PR-5)
(SA-16; PR-5)

c. Observe customer's expression to see if he/she:

- (1) Shows satisfaction;
- (2) Shows disapproval;
- (3) Shows doubt;
- (4) Shows interest in merchandise;
- (5) Maintains good eye contact.

d. Observe customer's mannerisms to determine:

- (1) If the customer is hurried;
- (2) If the customer is relaxed;
- (3) The customer's mood.

(SA-17; PR-9)
[CTIB 032-00-11]
(HO-8)

4. Ask pertinent questions to identify more clearly needs, wants, interests, etc.

a. Use proper questioning techniques:

- (1) Make questions short;
- (2) Make questions easy to answer--open-ended so they cannot be answered by yes or no;
- (3) Make questions impersonal;
- (4) Ask questions freely--but not too many;
- (5) Make use of evasive answers;
- (6) Ask questions which call for a positive response.

b. Develop questions around the product or service (who, what, when, where, why, and how):

- (1) Who is the item for?
- (2) What color, fabric, and style are preferred?
- (3) What size is needed?
- (4) Where will the item be worn?

(SA-18)

c. Get the merchandise into the customer's hands as you question.
d. Don't cross-examine the customer.
e. Save questions until needed.
f. Present questions at the proper time.
g. Properly word the questions.

(HO-9)(SA-19; PR-12)
[CTIB 033-00-11]
[CTIB 030-00-14]
[CTIB 030-00-15]

B. Present the merchandise.

1. Purpose of presentation is to maintain the interest aroused during the approach and to build desire for the item.
2. Specialized knowledge is needed for the sales presentation:

a. Background information of the merchandise;
b. Uses of the merchandise;
c. How to use the item;
d. The construction and/or content of the item;

e. How to care for the item;
f. How the item performs;
g. Services that accompany the item;
h. Competitive items;
i. Purpose of the item;
j. Appearance of the item;
k. Guarantees or warranties.

(SA-20; PR-7)

3. Develop the features of the presentation:

(SA-21)

  a. Select the merchandise to be shown.
    (1) Determine the customer's wants or needs.
    (2) If no specific item, style, color, or size is stated, select what you think will fit the needs.
  b. Determine how much merchandise to show.
    (1) The type of merchandise determines how much to show.
    (2) Too much may confuse; too little may not be sufficient to allow customer to reach a decision.
    (3) Several accessories may be shown at the same time.
    (4) Limit clothing to two or three items.
    (5) Eliminate items the customer does not like.
  c. Point out obvious features first.
    (1) Mention color;
    (2) Discuss style;
    (3) Point out special detail;
    (4) Reinforce what the customer already knows.
  d. Point out benefits.
    (1) Concentrate on the benefit that has particular appeal to the customer.
    (2) Let the customer know what the item will do for him/her.
    (3) Explain the benefits of the product features.
    (4) Relate benefits to customer needs.
    (5) Customers do not buy merchandise--they buy benefits.
  e. Handle the merchandise carefully and respectfully.

(SA-22)

    (1) The customer will observe you.
    (2) Careless handling implies that the product is not valuable.
    (3) Handle the product so customer can see the product and feature being pointed out.
  f. Encourage customer participation.
    (1) Appeal to the five senses of touch, smell, sight, taste, and hearing.
    (2) Prove the product will do what you said it will.
    (3) Use proper techniques of getting the merchandise into the customer's hands:
      (a) Handing it to the customer;
      (b) Letting the customer operate the merchandise;
      (c) Letting the customer try on the merchandise.
    (4) Ask questions that result in positive responses to:
      (a) Build an atmosphere of agreement;
      (b) Help obtain commitments from the customer.
    (5) Customer participation:
      (a) Is important because people retain 5-10% of what they see, 30-50% of what they see and hear, 50-70% of what they say, and 70-90% of what they do and say.

(TM-8)

      (b) Increases customer interest and builds desire in the merchandise.
      (c) Develops a feeling of ownership within the customer.

(SA-23; PR-12)
[CTIB 034-00-11]
[CTIB 034-00-12]
[CTIB 030-00-15]

  g. Appeal to the customer's reason.
    (1) Use facts and figures when available.
    (2) Note guarantee or warranty.
    (3) Present testimonials.
    (4) Cite reports in magazines, etc.
    (5) Keep selling points in logical order.

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h. Point out hidden features.

- (1) Show features not readily seen by customers, such as quality fabric blends.
- (2) These may not be noticed during customer particpation phase of the demonstration.
- (3) Use hidden features to justify the customer's spending money on the merchandise.

i. Present medium-priced item first.

- (1) Use medium-priced first if customer doesn't request differently.
- (2) Listen and watch customer's expression to determine if you should go lower or higher.
- (3) Don't ask how much they want to spend.

j. Dramatize the merchandise--find unusual ways to do or use usual things.

- (1) Use your voice to dramatize.
- (2) Use imaginative or descriptive words and gestures.
- (3) Be enthusiastic.
- (4) Dramatize the merchandise--its beauty, construction, etc.
- (5) Use visual aids--anything that causes the customer to use his/her sense of sight.
- (6) Use words and phrases that help the customer visualize the use of the merchandise.
  - (a) Avoid generalities.
  - (b) Avoid words which devalue the merchandise, such as "cheap."
  - (c) Avoid overused adjectives such as "nice."
  - (d) Avoid technical words without explanation with general customers.

k. Tactfully handle interruptions during the sales presentation.

- (1) Return to the customer as soon as possible.
- (2) Review some of the selling points you have already made, then continue.

l. Compare prices and price lines.

- (1) Categories of prices and price lines usually fall into low, medium, and high.
- (2) Merchandise is usually available within a store at a familiar or customary price line:
  - (a) Distinct prices--hats at $5, and $7.50, and $10.
  - (b) Price ranges--wallets at $6 to $8, $10 to $12, and $14 to $16.
  - (c) All hats and wallets fit into one of these prices or lines.
- (3) Customers become used to price lines which apply to their economic status.

(HO-10)

- (4) Justify price to yourself and to the customer:
  - (a) Study features and benefits of each price or price line;
  - (b) Prepare explanation of difference in features between lines.
- (5) Show medium-priced merchandise first--this allows an opportunity to move downward or upward.
- (6) Avoid reference to "cheaper" or "cheapest" merchandise--use "more economical" or "most economical" to eliminate the possibility of devaluing the merchandise.

(SA-24) [CTIB 035-00-11]

m. Inform customers of substitute merchandise if requested items are unavailable.

(HO-11)

- (1) Determine customer's need and recommend another similar item that fits the need.
- (2) Explain the relationship or similarity between the desired item and the substitute:
  - (a) Color;
  - (b) Use;
  - (c) Features;
  - (d) Price;
  - (e) Guarantee, warranty, etc.
- (3) Know your competitor's merchandise so well you can compare your own with theirs, feature for feature.
- (4) Point out buyer benefits of the substitute merchandise.
- (5) Don't run down or criticize the requested merchandise.
- (6) Don't blame someone else because you don't have the merchandise.

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- (7) Never use the word "substitute."
- (8) Do not apologize for your merchandise. (SA-25) [CTIB 036-00-11] [CTIB 036-00-12] [CTIB 036-00-13]

C. Overcome objections.

1. Determine objection or excuse.
   - a. An objection is a genuine concern or hesitation.
   - b. An excuse is an insincere reason to delay action.
     - (1) To deal with an excuse, question to determine the real objection.
     - (2) Treat excuse as a real objection and refer directly to it.
2. Recognize types of objections: (HO-12)
   - a. Objections to price--
     - (1) Example: "It's nice, but I hadn't planned to pay that much."
     - (2) Solution: Justify price in terms of merchandise features and benefits.
       - (a) Don't apologize for price.
       - (b) People buy value and benefit.
       - (c) Build up value by pointing out the benefits of certain features. (SA-26)
       - (d) Point out hidden features.
       - (e) If customer obviously cannot afford the price, show a less expensive item avoiding negative words such as "cheaper." (SA-27) [CTIB 037-00-11]
   - b. Objections to need--
     - (1) Example: "I don't think I'll get enough wear out of a long dress."
     - (2) Solution: Present the merchandise in relation to a buying motive and point out its benefits and uses.
   - c. Objections to product (color, comfort, design, size, style, suitability, type)--
     - (1) Example: "This isn't exactly what I had in mind."
     - (2) Solution: Show other merchandise or point out features to offset the objection.
   - d. Objections to source--
     - (1) Example: "I'm just not sure; the last time I bought shoes on a sale here, I found the same shoe at a lower price just up the street."
     - (2) Solution: Assure the customer of your desire to serve him/her and point out positive aspects of the business.
   - e. Objections to time (buying now)--
     - (1) Example: "I think I'll wait a while."
     - (2) Solution: Suggest advantages of buying right away, such as price increases, immediate wearing satisfaction.
   - f. Objections to quantity--
     - (1) Example: "One pair of hose, that's all."
     - (2) Solution: Point out benefits of buying more than one pair.
   - g. Objections to service--
     - (1) Example: "I have to wear my watch to work. It would probably take a long time to have it cleaned or repaired."
     - (2) Solution: Explain your service situation and reassure the customer of your service department's dependability.
   - h. Objections to store policy--
     - (1) Example: "The coat is nice but I could never do the alterations myself and you charge more for alterations to sale items."
     - (2) Solution: Reassure the customer; justify your store policy by pointing out the positive aspects, such as lower sale prices. (SA-28)
3. Use proper procedure for handling objections. (HO-13)
   - a. Listen very carefully to the objection.
   - b. Restate the objection.
     - (1) Use the prospect's words, or
     - (2) Change the objection into a question when possible.

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- c. Concede before answering.
    - (1) Let the customer know his/her point is important.
    - (2) Show respect for the customer's point of view.
- d. Answer objection briefly.
- e. Ask for customer's order. (SA-29; PR-3)

4. Use proper techniques for handling objections. (SA-30; PR-2) (HO-14)
    - a. Yes, but method:
        - (1) Is most widely used method.
        - (2) Acknowledges objection positively, then answers objection.
        - (3) Calms customer's emotions.
        - (4) May be used when customer misunderstands merchandise.
    - b. Direct-denial method:
        - (1) Is poorest method.
        - (2) Is a direct attack on the customer's opinion.
        - (3) May be used when objection is based on false information or misunderstanding.
        - (4) Is best used when the salesperson has prepared the customer for the response by using empathy.
    - c. Superior-point method:
        - (1) Admits the truth of the objection.
        - (2) Gives a superior selling point that outweighs the objection.
    - d. Boomerang method:
        - (1) Is used when the objection is based on a selling point and salesperson can turn the objection into a selling point.
        - (2) Tosses the objection back to the customer as a reason to buy.
    - e. Question method:
        - (1) Asks questions to explore objection.
        - (2) Helps salesperson determine what features and benefits are important to the customer.
        - (3) Allows extra time to think as you deal with the objection.
    - f. Demonstration method:
        - (1) Uses a test situation to show the customer the objection is wrong without having to say so.
        - (2) Allows salesperson to make the demonstration, then make a positive sales statement and continue presentation.
    - g. Third-party method:
        - (1) Refers to testimonial of a neutral third party.
        - (2) Avoids offending the customer.
    - h. Close-on-an-objection method:
        - (1) Involves an objection which may be a buying signal.
        - (2) Is used when objection deals with ownership.
        - (3) Requires salesperson to answer objection, then attempt to close.
    - i. Explanation method:
        - (1) May be used when you feel the customer has inaccurate facts or a false belief.
        - (2) Requires salesperson to ask customer to explain the objection.
        - (3) Requires salesperson to be tactful to avoid making the customer look ignorant. (SA-31)
5. Deal with objections immediately.
    - a. Immediately acknowledge the objection.
    - b. Pause briefly to give thought to the objection.
    - c. Proceed to answer the objection.
    - d. Never ignore or postpone an objection. (SA-32; PR-12)
6. Tactfully handle difficult customers.
    - a. Recognize characteristics of difficult customers: (TM-9)(HO-15)
        - (1) They gripe and complain about products and services without justification.
        - (2) They make unreasonable demands.
        - (3) They do not maintain objective viewpoints.

(4) They feel that all business people are greedy, unfair, and selfish.
(5) They desire to get something for nothing.
(6) They feel that they are superior human beings and that all others are inferior.
(7) They do not know what they want.
(8) They have difficulty making buying decisions.
(9) They have their minds set on one product, one price, one brand, etc., and are unwilling to consider other equal alternatives.
(10) They voice their opinions in loud, boisterous voices.

b. Use proper ways of handling difficult customers.

(HO-16) (TM-10)

(1) Remain calm.
(2) Show an interest in and concern for the customer; listen intently.
(3) Use tact in all conversations.
(4) Be courteous.
(5) Maintain positive attitude and belief that the customer is king.
(6) Demonstrate your knowledge and understanding of products, procedures, policies, and "human behavior."
(7) Maintain objective viewpoint.
(8) Maintain self-control at all times; never argue or try to prove you are right and the customer is wrong.
(9) Ask questions; obtain as much information as you can to better satisfy customer needs.
(10) Go out of your way to make the customer feel important and special.

(SA-33; PR-9)
[CTIB 038-00-11]
[CTIB 038-00-12]
[CTIB 030-00-15]

7. Anticipate objections.

a. Study the merchandise.

(1) Learn details and features.
(2) Learn benefits of each feature.

b. Expect objections to the product or specific features of the product.
c. Be prepared with product knowledge and the ability to point out superior points.
d. Plan your sales presentation to include all information the customers will need.

(1) Make a list of common objections or questions and features they apply to.
(2) List positive sales statement for each.
(3) Consider the customer's position; tell "why" in his/her viewpoint.
(4) Use positive rather than negative approach.
(5) Incorporate these points into sales presentation.

(SA-34)(SA-35; PR-5)
[CTIB 039-00-11]
[CTIB 030-00-14]
[CTIB 030-00-15]

D. Close the sale.

(SA-36)

1. The purpose of the close is to lead the customer to action upon the presentation you have given.
2. Obtain agreement and commitment from the customer.

(SA-37; PR-2)

a. Make the buying decision easy.

(TM-11)

(1) Do not show additional merchandise when you are ready to close.
(2) Narrow selection by removing all but two or three items.
(3) Help customers visualize ownership--use "you" and "yours."
(4) Ask customers to buy--give the opportunity to purchase the merchandise you just presented.
(5) Be confident--believe in your merchandise and its buyer benefits and its ability to meet the customer's needs.

(SA-38; PR-3)

b. Overcome buying resistance.

(1) Ask a "why" question.
(2) Deal with the objection.
(3) Move toward a natural close.

c. Take advantage of buying signals or signs of approval which include:

(TM-12)

(1) Facial expressions;
(2) Certain types of objections;
(3) Agreement with sales statements;
(4) Actions or movements indicating interest;
(5) Questions or comments about merchandise.

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d. Attempt a trial close when you receive a buying signal.

(TM-13)

- (1) A trial close usually takes the form of a question, such as, "I'm sure you will like it, don't you agree?"
- (2) If unsuccessful, continue naturally with the sales presentation.

e. Use proper basic closing technique:

(1) Ask-your-customers-to-buy close--

Example: "The dress is 50% polyester, 50% dacron and permanent press; just wash and wear. It is the ideal dress to take on your business trip to Atlanta. Don't you agree?"

- (a) Review major selling features and benefits.
- (b) Summarize reasons customer should buy.
- (c) Ask customer to buy.

(2) Choice or minor-point close--

Example: "Do you prefer the cardigan or the V-neck style" or the customer may ask the salesperson's opinion: "Which do you think fits better?"

- (a) This is probably the most widely used and best close method.
- (b) Selection should be narrowed to two items.
- (c) Offer a choice between the two items using color, style, size, material, or other features.
- (d) Give honest opinion if customer asks you for a choice.

(3) Assumption close--

Example: "Would you like this gift wrapped?"

- (a) Customer agrees on minor points during the presentation.
- (b) You assume customer will buy.
- (c) Ask question or make statement dealing with delivery, service, care of merchandise, methods of payment, or other item of business.

(4) Advantages-disadvantages close--

Example: "The need to remove the pin before laundering is an inconvenience, but the beauty it adds really gives the jacket a look of sophistication. It can also be replaced with your own favorite pin to give variety."

- (a) Summarize the customer's reasons to buy.
- (b) Appeal to rational motives.
- (c) Turn disadvantages into selling points.
- (d) If customer is satisfied, continue to close.
- (e) If customer is dissatisfied, select another item.

(5) Premium close--

Example: "With your purchase of the boots during October, Logan's gives you a bottle of our special weatherproofing to protect your investment."

- (a) Offer something extra in addition to the purchase.
- (b) Attempt to make the customer buy now.

(6) Last-chance-to-buy close--

Example: "Our discount days end tomorrow and this is the last bridal gown we have in your size. I'm sure you would prefer to save money and a trip out of town to find another. Shall I lay it away for you?"

- (a) Base your statement on the customer's desire for gain or for fear of losing the opportunity to buy later.
- (b) Use honesty.
- (c) Stress customer need and benefit of buying now.

(7) Standing-room-only close--

Example: "This shoe has been our best seller this fall; we just received our last shipment for the season."

- (a) Use honesty.
- (b) Appeal to the customer's emotional fear of losing ownership opportunity.

(8) Narrative or testimonial close--

Example: "David Johnson, a local businessman and a national Civitan officer, bought one of these suits last spring. He does a great deal of traveling and told me he has never had a suit that is as wrinkle-free for travel wear and packing convenience."

(a) Use honesty.
(b) Relate another person's successful experience or remarks to the customer's need for the item.

(9) Objection close--

Example: A customer has objected to the weight of a coat and has answered that this is his only reason for not buying. "The coat is heavyweight, but that can easily be remedied by zipping out the wool liner, thus giving you a lightweight coat for cool days, both with protection from weather elements. Would you like me to remove the lining so you can feel the difference before I wrap it for you?"

(a) Ask if the expressed objection is the only reason for not buying.
(b) Overcome the objection as you close.

(10) Suggest-related-merchandise close--

Example: "The dress can be given an entirely different look by wearing a scarf and matching belt."

(a) Use related merchandise to help care for or enhance value of the original item.
(b) Show new ideas. (HO-17)(SA-39)

f. Avoid errors in closing.

(1) Avoid negative statements such as, "You wouldn't want this, would you?"
(2) Avoid offering substitute items that are not satisfactory for customer needs.
(3) Avoid scare tactics such as, "There won't be any coats left by Friday."
(4) Avoid dishonesty just to make a sale.
(5) Avoid rushing or pushing the customer into a hasty decision.

(SA-40; PR-9)
[CTIB 040-00-11]
[CTIB 040-00-12]
(SA-41; PR-12)
[CTIB 030-00-14]
[CTIB 030-00-15]

3. Thank customers to encourage repeat business.

a. Say "thank you" to:

(1) Make customer aware that the store appreciates his/her business.
(2) Maintain customer goodwill.
(3) Make future sales easier.

b. Give a final word of assurance.

(1) Make a compliment on the purchase.
(2) This helps the customer to feel he/she has made a wise choice.

c. Ask customer to come back again soon.

(SA-42)
[CTIB 041-00-11]
[CTIB 041-00-12]
[CTIB 030-00-15]

E. Use suggestion selling and build clientele.

1. Use suggestion selling. (HO-18)(TM-14)(SA-43)

a. Suggestion selling is a selling technique which allows the salesperson to give the customer a buying idea leading to the purchase of additional merchandise.
b. The purpose of suggestion selling is: (HO-19)

(1) To make more profit for the store;
(2) To make more commission to the salesperson, and it makes the salesperson more valuable to the store;
(3) To provide service to the customer in helping him/her better satisfy needs and wants.

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c. Use proper techniques for making suggestions:
    (1) Remember that goods will sell themselves if properly displayed.
    (2) Suggest goods that will really benefit the customer.
    (3) Be specific--do not suggest a long list of articles.
    (4) Do not make suggestions indiscriminately to all customers.
    (5) Demonstrate the suggested goods whenever possible.
    (6) Avoid negative suggestions such as, "Is there anything else?"
    (7) Listen to determine what to suggest.
    (8) Make suggestions after the customer has made the buying decision but before the sale is written up or rung on the register.

(SA-44; PR-9)

d. Types of suggestions include:
    (1) New merchandise--

        Example: "Our new fall blazers just arrived this week. I think you will be just as excited about them as I am."

    (2) Larger quantities--

        Example: "Two pair of hose would give you an extra for an emergency."

    (3) Merchandise specials--

        Example: "We are closing out our summer-weight knit shirts at half-price."

    (4) Special occasions or seasonal items--

        Example: "Martha, Father's Day is just around the corner. You might want to look at our gift ideas display before you leave."

    (5) New or different uses for merchandise--

        Example: "This hostess apron can be folded and buttoned to form a sun bonnet."

    (6) Related or accessory items--

        Example: "This tie emphasizes the green you like so well in the pattern of the shirt."

(SA-45; PR-9)

        (a) This if the most common method of suggestion selling.
        (b) Usually suggest items lower in price and accessories for the original item.
        (c) Develop knowledge of all items in your department and in other departments that relate to yours.
        (d) Use coordinated displays as a suggestion aid.
        (e) Do not assume the customer already has accessories to accompany the purchase.
        (f) Remember that one item always relates to another in some way.

(SA-46; PR-9) or (SA-47; PR-9)
[CTIB 042-00-11]
[CTIB 042-00-12]
[CTIB 030-00-15]

    (7) Better quality/higher-priced merchandise ("trading-up")--
        (a) Use when you are sure the customer would benefit from better quality--determine customer's intended use.
        (b) Point out similar features in both items.
        (c) Point out additional features and benefits to justify extra cost.
        (d) Do not belittle lower priced merchandise by inferring it is poor quality, cheap, or inferior.
        (e) Do not insist or pressure the customer to buy the better article.

(SA-49)
[CTIB 043-00-11]
[CTIB 043-00-12]
[CTIB 043-00-13]

2. Build clientele.

(SA-50; PR-5)

a. Clientele is a group of regular customers who ask for the same salesperson.
b. Use proper techniques for building clientele.
    (1) Know your customers and your merchandise so as to offer helpful suggestions.
    (2) Remember customer's name and call him/her by name.

(HO-20)

        (a) Show interest.

(b) Really observe the face.
(c) Get the name right and repeat it.
(d) Find an association.
(e) Review the name, visualize the face, write the name down.

(3) Present business cards with your name on them to customers you want to continue to serve.
(4) Maintain customer book or card file with customer information: (PR-10, p. 29)

(a) Customer's name;
(b) Address;
(c) Telephone number;
(d) Size;
(e) Other members of the family--name, age, sex;
(f) Color, quality, design preferences;
(g) Special interests;
(h) Occupation;
(i) Any other information to help you better serve the customer.

(5) Use customer book or card file to talk with or call the customer: (PR-10, p. 29)

(a) When you just received merchandise in his/her size that will be of interest to him/her;
(b) When you think the customer might be running low on a regularly purchased item;
(c) When a requested item arrives;
(d) When you can supply merchandise for a specific occasion;
(e) When a desired item is reduced. (SA-51) [CTIB 044-00-11]

## III. Sales Related Activities

A. Sales related activities include charge and cash transactions. (SA-52; PR-2)

1. Charge transactions involve the customer charging merchandise to a charge account in order to pay later. (HO-21)

a. Charge-take is when the customer charges items and takes them with him/her.
b. Charge-send is when the customer charges items and has them delivered.
c. The two basic charge account systems include:

(1) The store's own charge account system;
(2) Charge accounts through a bank or independent credit card plan.

d. To process a charge transaction, the salesperson should:

(1) Obtain customer's charge card (or verify identification);
(2) Check card against invalid list;
(3) Record transaction on a sales form (receipt or purchase) or bank credit card form-- (TM-15)

(a) Date;
(b) Customer's name and complete address;
(c) Salesperson's identification;
(d) Charge sale indication (if general sales form);
(e) Merchandise description, quantity, price, etc.;

(4) Obtain customer's signature;
(5) Compare signature to credit card;
(6) Return card to customer;
(7) Obtain approval (credit authorization);

(a) Check credit limit if store account;
(b) Observe credit card limit policy--such as calling a specified number for authorization on purchases over $50, etc.;

(8) Give customer his/her copy of sales slip;
(9) Bag merchandise;
(10) Thank the customer. (SA-53; PR-12)

2. Cash transactions involve the customer immediately paying for the merchandise with cash or check.

a. Cash-send is when the customer pays and items are delivered.

(1) Record name and address;
(2) Indicate "delivery."

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b. Cash-take is when the customer pays and takes items with him/her.

c. Record transaction on a sales form:

(TM-16)

  (1) Date;
  (2) Customer name and address (optional);
  (3) Salesperson's identification;
  (4) Indicate cash sale;
  (5) Merchandise description, quantity, price, etc.;
  (6) Extend each line;
  (7) Subtotal;
  (8) Figure sales tax;
  (9) Total.

(SA-54)
[CTIB 045-00-11]
[CTIB 045-00-12]
[CTIB 045-00-13]

3. Accurately calculate the exact amount of a customer's purchase.

  a. Extend the sales slip entries.

    (1) For single items, extension will be the same as the unit price.
    (2) For multiple items priced individually:

      (a) Multiply quantity by unit price.
      (b) Answer will be extension.

    (3) For fewer items than that originally multiple-priced (3 for $4.39):

      (a) Divide multiple price by number of units ($4.39 ÷ 3 = $1.46 1/3).
      (b) Any fraction of a cent is counted as a whole cent ($1.46 1/3 = $1.47) (One item = $1.47; two items = $2.94).

  b. Subtotal--add all extensions.

  c. Figure sales tax.

    (1) Manually compute tax.

      (a) Convert the tax percentage to a decimal fraction (3% = .03; 4% = .04; 3 1/2 = .035).
      (b) Multiply decimal fraction by the merchandise total.
      (c) Round answer to the nearest cent.

    (2) Use tax schedule figured to $1.00.

(TM-17)

      (a) For sales under $1, use this schedule to find the tax.
      (b) For sales over $1, separate the subtotal into dollars and cents; use tax schedule for cents; figure tax on dollars by multiplying dollar amount by tax rate; add the two amounts together to get tax total.

    (3) Use tax chart.

(TM-18)

      (a) Locate the range on the chart in which the subtotal falls;
      (b) The tax listed to the side of this range is the tax for that sale.
      (c) Subtotal.
      (d) Total--add subtotal and tax.

(SA-55)
[CTIB 046-00-11]
[CTIB 046-00-12]
[CTIB 046-00-13]

4. Accurately compute employee discounts, delivery charges, alteration charges, layaway charges, etc., when writing out saleschecks.

(SA-56; PR-4)

  a. Compute employee discounts.

    (1) Discounts range from 10 to 25 percent usually.
    (2) Multiply the merchandise total by the percentage rate to get discount amount.
    (3) Subtract the discount amount; then compute tax and total.

(SA-57)

  b. Compute delivery charges.

    (1) For delivery beyond free delivery points, stores may use the U.S. Postal Service, UPS, or other transportation or delivery companies.
    (2) Cost depends on:

      (a) The class of mail;
      (b) Weight of merchandise;
      (c) Distance merchandise is being sent.

- (3) Figure charge by using a chart for appropriate weight, type of delivery, and zone location of delivery point.
- (4) Add delivery charge to sales slip total after tax has been computed.
- (5) Note delivery instructions if necessary.
- (6) With COD, the customer may order by telephone or mail and pay for merchandise when it is delivered plus an additional delivery or handling charge based on the amount to be collected.

(SA-58)

c. Compute alteration charges.

- (1) Alteration fees may be set by store or by tailor or seamstress.
- (2) Fee usually varies for type of alteration.
- (3) Complete alteration instruction tag or form if applicable.
- (4) List alteration charge on sales form before subtotaling merchandise.
- (5) State tax is charged on alterations.

(SA-59)

d. Compute layaway charges.

- (1) The customer pays deposit (usually 10 to 25 percent) to have merchandise held until later.
- (2) Sometimes a small service charge may be added to hold the merchandise.
- (3) Layaway allows a certain time to pay cost of merchandise plus tax.
- (4) Customer receives merchandise when it is paid for.
- (5) No finance charge is collected.
- (6) Salesperson computes deposit percentage of merchandise total and subtracts it to get balance due.
- (7) A sales form is written for the deposit.

(SA-60)
[CTIB 047-00-11]
[CTIB 047-00-12]
[CTIB 046-00-13]

5. Write saleschecks legibly so that error in delivery, quantities sent, and amounts charged can be eliminated.

a. Common mistakes in writing saleschecks include:

- (1) Poor handwriting;
- (2) Poor arithmetic;
- (3) Omission of required information.

b. Legibility and accuracy is important because:

- (1) Customers refer to the saleschecks.
- (2) Delivery department uses them to tell what goods to ship and where.
- (3) Credit department uses them to total amounts owed on charge accounts.
- (4) Buyers use them to decide what items and quantities to order.
- (5) Management uses them to determine sales volume and to plan for the future.
- (6) Accountants use them to keep inventory records.

c. Write saleschecks legibly.

- (1) Printing in all capitals is desirable.
- (2) Be careful that all figures and letters are legible and are not likely to be confused with similar figures or letters.

d. Be accurate.

- (1) Check all information you are not sure of.
- (2) Use accuracy in all mathematical functions--addition, subtraction, multiplication, division, fractions, percentages, decimals.
- (3) Avoid transposing figures.
- (4) Be sure decimals are in the right position.

(SA-61)
[CTIB 048-00-11]

B. Sales related activities include layaway.

1. Several factors are included in layaway sales.

- a. The customer makes a partial payment on selected merchandise.
- b. Merchandise is withdrawn from stock but retained by the store until it is completely paid for.
- c. Salescheck is made out for amount collected (down-payment, deposit).
- d. Layaway or will-call tag is attached to merchandise that is placed in the layaway department.
- e. A time limit is set, after which merchandise is returned to stock if the customer has not made the payment agreed upon.

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2. Customers use layaway because they may:
   a. Purchase merchandise before it is in season;
   b. Obtain an item hard to find or replace to avoid its being out of stock when needed;
   c. Be able to purchase more expensive merchandise;
   d. Be able to take advantage of sales specials.
   e. Take advantage of convenience in paying for merchandise over a period of time without finance charges.

3. Layaway has advantages to the customer and the store.
   a. Customers obtain merchandise and pay later without finance charge.
   b. It builds goodwill for the store.

4. The salesperson must process the layaway.
   a. Types of layaway forms include:
      (1) General or charge sales form with additional layaway information. (TM-19)
         (a) Check or indicate "Layaway."
         (b) Check "Charge."
         (c) List any special instructions--how long to hold, etc.
      (2) General or charge sales form plus special layaway ticket. (TM-20)
      (3) Specially designed layaway sales form. (TM-21)
   b. To record layaways:
      (1) List merchandise and extend prices;
      (2) Subtotal;
      (3) Compute sales tax;
      (4) Add service charge if applicable (small fee charged by some stores to hold the merchandise);
      (5) Total the sale;
      (6) Compute and subtract deposit or down payment;
         (a) A percentage of the total sale;
         (b) Usually 10 to 25 percent;
      (7) Balance is called layaway balance;
      (8) Have customer read, agree to, and sign layaway agreement. (SA-62)
   c. To receive payments on layaways:
      (1) A layaway account is maintained for each layaway customer. (TM-22)
      (2) Payment is recorded on a sales form: (TM-23)
         (a) Indicate received on account;
         (b) List amount received;
         (c) Indicate "Layaway deposit" under "Item" or "Description";
         (d) Indicate means of payment--cash or check;
         (e) Record the total payment.
      (3) The payment is then posted (by salesperson or in office) to the layaway account record. [CTIB 049-00-11] [CTIB 046-00-13]

C. Sales related activities include refunds and exchanges.
   1. Stores usually establish policies regarding refunds and exchanges, such as:
      a. Setting a time limit when merchandise may be returned;
      b. Requiring a sales receipt or cash register tape;
      c. Refusing to accept merchandise that cannot be resold after use or wear;
      d. Allowing exchanges only rather than cash refunds.
   2. Types of adjustments include: (HO-22)
      a. Cash refunds;
      b. Credit refunds/charge credits;
      c. Exchanges;
      d. Partial allowances.
   3. Reasons for adjustments include:
      a. Store policies which may result in returns:
         (1) COD's;
         (2) Sales on approval.
      b. Store personnel who:
         (1) May misrepresent or not fully explain merchandise;

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   (2) May pressure customers to buy something they really don't want;
   (3) May select the wrong size, color, etc., or make mistakes on saleschecks;
   (4) May make errors in wrapping, accounting, or delivery which may cause complaints.

4. Maintain positive atmosphere during the refund or exchange transaction.

   a. Follow store policies and recommended procedures.
   b. Help the customer achieve a good frame of mind.
   c. Do not argue.
   d. Keep the customer's feelings in mind. (PR-6, pp. 100-108)

5. Procedure for a cash refund includes:

   a. Customer receives money equal to that originally paid.
   b. Cash refund is given only if original purchase was cash.
   c. Customer usually must present sales receipt before being refunded.
   d. The transaction is filled in on sales form indicating "paid out" rather than "cash" or use a special cash refund form: (TM-24)

      (1) Date;
      (2) Customer's name and address;
      (3) Employee identification;
      (4) "Paid out";
      (5) Merchandise description, price, extension, etc.;
      (6) Special notations such as "cash refund";
      (7) Subtotal, sales tax, total;
      (8) Customer signature. (PR-2, pp. 287-288)(SA-63)

6. Procedure for credit refunds (charge credit) includes:

   a. Charge credit is given for original cash or charge sales.
   b. If customer does not have a charge account, a due bill or merchandise certificate may be given to be used instead of cash to purchase other merchandise from the store.
   c. The transaction is recorded as "received on account" and credited to customer's charge account: (TM-25)

      (1) Date;
      (2) Customer's name and address;
      (3) Employee identification;
      (4) "Received on account";
      (5) Merchandise description, quantity, price, extension, etc.;
      (6) Special notations such as "charge credit";
      (7) Subtotal, sales tax, total;
      (8) Customer signature. (PR-2, pp. 289-290)(SA-64)

7. Procedure for even exchanges includes:

   a. The item is exchanged for similar item of same price.
   b. No money is exchanged.
   c. If item information is not the same, complete a new sales form and special exchange form if applicable: (TM-26)

      (1) Date;
      (2) Employee identification;
      (3) "Cash";
      (4) Merchandise description, quantity, price, extension, etc., of returned item;
      (5) Merchandise description, quantity, price, extension, etc., of replacement;
      (6) Special notation such as "even exchange";
      (7) Customer signature. (SA-64; PR-12)

8. Procedure for uneven exchanges includes:

   a. Item is exchanged for item of different price.
   b. Customer pays more or business refunds the difference.
   c. There are two methods of recording the transaction:

      (1) Write cash refund, then new cash sales form. (TM-27)

         (a) If the new item is more, customer pays the difference.
         (b) If new item is less, store refunds the difference.

      (2) One sales form is written.

         (a) If new item is more, write cash sales form--customer pays the difference. (TM-28)

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        (b) If new item is less, write paid out or refund--store refunds the difference. (TM-29)
        (c) List most expensive item first.
        (d) Indicate which is the returned item.
        (e) List the difference in the price of the two items as the subtotal.
        (f) Compute sales tax and total.
        (g) Obtain customer signature.
        (h) Obtain approval if necessary. (SA-66)

  9. Procedure for partial allowances includes:

    a. A partial allowance may be offered for used items, items returned a long time after purchase date, or if a manufacturing fault is involved.
    b. The amount of the allowance is determined by the time the item was used or the extent of usage.
    c. The date of purchase must be determined.
    d. Process as a refund if no other item is selected.
    e. Process as an exchange if a new item is selected. (SA-67)

[CTIB 050-00-11]
[CTIB 050-00-12]
[CTIB 050-00-13]

D. Sales related activities include gift certificates and special orders.

  1. Gift certificates are written by salespersons.

    a. Customer purchases a gift certificate that states a specific person has a specific money amount to spend with the issuing store.
    b. Salesperson completes sales form and fills in the gift certificate.

      (1) Sales form information includes: (TM-30)

        (a) Date;
        (b) Recipient's name and address;
        (c) Employee identification;
        (d) "Received on account";
        (e) Under "Item" write "Gift Certificate # ___";
        (f) Name and address of customer who is presenting the certificate;
        (g) Certificate amount which is also the sales form total.

      (2) Gift certificate information includes: (TM-31)

        (a) The same information on the certificate and stub;
        (b) Date issued;
        (c) Recipient's name (ask for correct spelling);
        (d) Address on stub only;
        (e) Amount--spell out on certificate;
        (f) Name of person or group presenting certificate;
        (g) Address of presenting person or group on stub. (SA-68)

  2. The salesperson also handles special orders.

    a. Fill in want slip for any item called for that is not in stock (whether carried regularly or not): (TM-32)

      (1) Date;
      (2) Dept. No.;
      (3) Employee identification;
      (4) Name of item called for;
      (5) Style, color, size, price;
      (6) Indicate whether order was taken, substitute sold, or sale lost.

    b. Fill in special order request if customer wants to order an item that is not in stock: (TM-33)

      (1) Date;
      (2) Dept. No.;
      (3) Employee identification;
      (4) Customer's name, address, and telephone number;
      (5) Name of item;
      (6) Quantity;
      (7) Style, color, size, price;
      (8) Subtotal, total, tax;
      (9) Customer's signature. (SA-69)

[CTIB 051-00-11

E. Sales related activities include telephone sales: (HO-23)
1. Types of telephone selling include calling the customer:
a. To tell about special merchandise--

(1) Merchandise of interest to customers;
(2) Arrival of requested merchandise;

b. To take orders;
c. To renew old accounts--

(1) Invite customers back for special event;
(2) Inform customers of new line of merchandise;

d. To follow up on recent purchases;
e. To sell to new customers;
f. To handle complaints;
g. To tell about special events;
h. To close sales;
i. To acknowledge orders;
j. To make appointments;
k. To build prospect list;
l. To build customer goodwill.

2. Use personality in telephone selling.

a. Be courteous.

(1) Identify yourself, department, and store.
(2) Acknowledge greetings and answer questions.

(a) Have someone else answer the question if you cannot.
(b) Ask for customer's name and number and call back if extra time is needed.

(3) Use empathy or sympathy where necessary.
(4) Use friendly closing statement.

b. Display interest and attention.

(1) Listen attentively.
(2) Appreciate customer's point of view.
(3) Show interest in conversation.
(4) Do not interrupt the customer.

c. Show sincerity and helpfulness.

(1) Provide information.
(2) Grant requests.
(3) Check out customer problems.
(4) Suggest substitutes or alternatives.
(5) Be aware of unusual circumstances.
(6) Explain why a request might be refused.
(7) Keep all promises.

3. Observe telephone selling rules.

a. Select good quality, fairly priced merchandise which should be of interest to the customer.
b. Carefully select, review, and update prospects.
c. Carefully plan sales talk ahead of time.
d. Know merchandise and store policies. (TM-33)
e. Have a purpose for calling.
f. Select convenient time for customer.
g. Do not make impossible promises.
h. Use pleasant voice. (PR-8, pp. 376-381)

4. Plan the sales talk. (HO-24)

a. Obtain attention and interest.

(1) Use customer's name in greeting.
(2) Introduce yourself and the business.
(3) Use attention-getting approach:

(a) After-mailing approach--the customer has just received mail about an item or service.
(b) Bargain approach--you have a special bargain such as a close-out.
(c) Demonstration approach--your store will be providing a special demonstration.

PLANNING NOTES

(d) Inactive account approach--you are checking to see why the customer hasn't been in lately.
(e) Service approach--let the customer know of services your store offers.
(f) Special-occasion approach--refer to an event in the custo life or a seasonal event.
(g) Special sale or bargain approach--new shipment or special prices of interest to customer.
(h) Thank-you approach--you thank the customer for a recent order and follow up on it.

b. Create desire.

(1) Ask positive questions to help customer establish a need.
(2) Make feature-benefit statements throughout the conversation.
(3) Show enthusiasm about merchandise by using vocabulary to help customer visualize merchandise:

(a) Expressive adjectives--economical, stylish.
(b) Forceful words--quality, guaranteed.
(c) Personal words--you, your.
(d)

(4) Describe merchandise in terms customer understands.
(5) Provide all necessary facts.

c. Overcome objections:

(1) Personal objection to salesperson or store;
(2) Postponement objection--waiting until later;
(3) Price objection--point out extra benefits;
(4) Product or service objection.

d. Close the sale.

(1) Listen for buying signals.
(2) Ask the customer to purchase with an appropriate closing technique:

(a) Assumed close;
(b) Choice close;
(c) Summary close.

(3) Obtain and record necessary information on telephone order form or note pad:

(a) Customer's name;
(b) Name to whom merchandise is to be charged and/or sent;
(c) Address where merchandise is to be charged and/or sent;
(d) Customer's telephone number;
(e) Type of sale (COD, revolving charge, bank card, cash, etc.);
(f) Delivery instructions;
(g) Complete description of merchandise (article number, quantity size, weight, unit price, etc.).

(PR-8, pp. 383-388)(SA-70)
(SA-71; PR-11) or (SA-72;PR-9)
[CTIB 052-00-11]
[CTIB 052-00-12]
[CTIB 052-00-13]

F. Other sales related activities include self-service duties and working with more than one customer.

1. Sell to customers in a self-service store while performing regular storekeeping duties.

(SA-73; PR-8)

a. Self-service uses special techniques.

(1) Customers select actual or sample merchandise that is on display.

(a) Merchandise is displayed within convenient reach of customers.
(b) Display signs, tags, or labels give merchandise information.

(2) Customer needs and wants are considered when merchandise is displayed.
(3) Principles of selling are used in preparing display materials such as labels, tags, and signs.

b. Duties of self-service personnel may include:

(1) Stocking shelves and racks;
(2) Operating the cash register;

(3) Wrapping merchandise;
(4) Marking merchandise;
(5) Inventorying;
(6) Preparing displays;
(7) Housekeeping;
(8) Being alert for shoplifting.

c. Selling duties of self-service personnel may include:

(1) Recording selected merchandise information on a form which customer then presents at checkout desk if using sample-item displays;
(2) Explaining merchandise;
(3) Answering customer questions;
(4) Directing customers to requested merchandise;
(5) Giving advice on purchases;
(6) Convincing customers to buy;
(7) Making sales presentation when necessary.

d. Techniques for performing self-service selling include:

(1) Greeting customers when possible;
(2) Promptly approaching when assistance is needed--

(a) Be friendly;
(b) Do not become upset over having to stop what you were doing;
(c) Ask the customer if he/she is finding what he/she wants rather than asking if you can help;

(3) Offering a sales cart or basket when the customer needs one;
(4) Directing the customer to merchandise and/or checkout counter rather than going with him/her;
(5) Suggesting related merchandise or inviting the customer to visit other departments after he/she finds wanted item;
(6) Accepting payment only at a checkout station.

(SA-74)
[CTIB 053-00-11]

2. Work with more than one customer simultaneously in a courteous manner.

a. If busy with another customer, acknowledge the presence of the second customer.

(1) When the first customer requires full attention:

(a) Acknowledge second customer by a smile and a nod of the head;
(b) Then, continue the first sale.

(2) When the first customer needs attention but is not ready to buy:

(a) Speak to second customer saying you or someone else will be with him/her in a minute;
(b) Maintain eye contact so customer will not think you have forgotten.

(3) When the first customer is in early stages of the buying decision and does not require full attention:

(a) Excuse yourself momentarily from the first customer;
(b) Greet the second customer;
(c) Determine what you can do for the second;
(d) Direct his/her attention to merchandise if possible;
(e) Return to first customer.

b. Observe these rules for working with more than one customer at a time:

(1) Greet all customers;
(2) First customer has first priority for your assistance;
(3) Start serving only the number of customers you can handle at once;
(4) Do not abruptly leave one customer to help another.

c. If the sale involves trying on clothes or slow and careful consideration, a second sales presentation could be started.

(SA-75)
[CTIB 054-00-11]

# STUDENT ACTIVITIES

# PERSONAL SELLING

Have students complete the Pretest for IDECC Selling LAP 3, 938. SA-1

Have the students read Retail Selling, 2nd ed., Ch. 8, "Developing Your Sales Personality," pp. 91-101. Complete activities "Selling Terms" and "Retail Review," p. 101, and "Human Relations," p. 102. SA-2

Show the slide-tape presentation "F.U.D.--Fear, Uncertainty, Doubt", Session #1, "Introduction." This is available through the D.E. Supplier Company, P. O. Box 214, 1380 South Pennsylvania Avenue, Morrisville, PA 19067. (Cost: $219.00 set and 12% shipping). SA-3

See page 35 for Student Activity #4. SA-4

Have students complete Handout #4, IDECC Selling LAP 43, 918B. SA-5

Show the slide-tape presentation F.U.D., Session #2, "Approach and Greeting." (Refer to SA-3 for source). SA-6

Have the students read Retail Selling, 2nd ed., Ch. 20, "Opening the Sale," pp. 240-246. SA-7.

This activity is intended to emphasize the importance of a good approach in place of the overused "May I help you?" Before class make a minute-and-a-half tape recording of the words "May I help you?" During class discussion on the importance of the approach, introduce this tape by saying, "We have a tape recording of the approaches used by most average run-of-the-mill salespersons. I am going to play it to you and ask you to evaluate the approach and to tell the class how it affects you." When the recording is played and all they hear is "May I help you?" you then introduce some other acceptable approaches such as the merchandise approach or the service approach. The recording will be stamped in the minds of the students, and they may lose the habit and replace it with good sales approaches. SA-8

Have students complete Handout #4, IDECC Selling LAP 31, 869B. SA-9

Have the students complete Jeffrey's Department Store--A Retailing Simulation, Mini-Simulation 2, Incident 5. SA-10

Have students complete Handout #9, IDECC Selling LAP 40, 830B. SA-11

Have students complete Handouts #1 and #2, IDECC Selling LAP 40, 870A. SA-12

This is a class activity designed to help the students develop and ask purposeful and meaningful questions to determine a customer's needs. (1) Divide the class into two groups, with one student representing each group (Student A and Student B). (2) Have student A select an apparel or accessory item and develop a reason for needing the item. The student should list the reason(s) on paper and tell only the name of the item to Student B. (3) Student B, once knowing the product, will have 5 to 10 minutes to formulate and ask questions to determine A's need for the item. (4) Once the process is completed, reverse the order with B selecting the item and A asking questions. (5) Keep a point system if desired for each correct customer need that is determined. SA-13

Have the students read Selling Fashion Apparel, Section V, "Techniques of Selling Women's Apparel," pp. 52-68, and Section VI, "Techniques of Selling Men's Apparel," pp. 69-87. SA-14

Have the students complete Selling Fashion Apparel, Section V, Project 34, "Selection of Women's Apparel According to Figure Type," pp. 163-166. All students (male and female) should use female figure types for pages 165-166. SA-15

Have the students complete Selling Fashion Apparel, Section VI, Project 46, "Solving Customer's Figure Problems" (Male), pp. 193-194. SA-16

Have students complete Form #12, IDECC Selling LAP 51, 884C. SA-17

See page 36 for Student Activity #18. SA-18

Have the students complete Jeffrey's Department Store--A Retailing Simulation, Mini-Simulation 2, Incident 6. SA-19

Have the students read Fashion Marketing & Merchandising, "Know Your Merchandise," pp. 40-41. SA-20

Show the slide-tape presentation F.U.D., Session #3, "Selling Features and Benefits and Handling Objections." (Refer to SA-3 for source). SA-21

Have students complete Form #2, IDECC Selling LAP 45, 807. SA-22

Have the students complete Jeffrey's Department Store--A Retailing Simulation, Mini-Simulation 2, Incident 7. SA-23

See page 38 for Student Activity #24. SA-24

Have students complete Worksheet #2, IDECC Selling LAP 58, 871B. SA-25

Have students complete Form #1, IDECC Selling LAP 34, 827. SA-26

See page 39 for Student Activity #27. SA-27

Have students complete Posttest, IDECC Selling LAP 49, 874A and 874B. SA-28

From the record accompanying Basic Selling, have the students listen to Record 1, Side 2, Band 2, "Selling Is Not Arguing." Before starting the record, read page 84 and ask the students to list on paper these steps: (1) Listened carefully to the objection; (2) Restated the objection; (3) Conceded before answering; (4) Answered briefly; (5) Asked for order. Ask the students to check the appropriate step or steps as they listen to the second sale and write key words to indicate where the step or steps took place in the sale. SA-29

Have the students read Selling--Helping Customers Buy, "Techniques for Answering Objections," pp. 203-209. SA-30

See page 40 for Student Activity #31. SA-31

Have the students complete Jeffrey's Department Store--A Retailing Simulation, Mini-Simulation 2, Incident 8. SA-32

Have students complete Posttest, IDECC Selling LAP 28, 280. SA-33

| | |
|---|---|
| See page 41 for Student Activity #34. | SA-34 |
| Have the students complete Selling Fashion Apparel, Section V, Project 35, "Dealing with Customers' Objections," pp. 167-168, or Section VI, Project 48, "Handling Objections of Male Customers," pp. 197-198. | SA-35 |
| Show the slide-tape presentation F.U.D., Session #5, "Closing and Customer Service." (Refer to SA-3 for source). | SA-36 |
| Have the students read Selling--Helping the Customer Buy, Ch. 12, "Closing the Sale," pp. 213-235. | SA-37 |
| From the record accompanying Basic Selling, have the students listen to Record 2, Side 1, Band 1, "Selling Makes It Easy for the Customer to Buy." After listening to the recording, as suggested on p. 98 of the text, ask the students in class discussion to rebuild the first two unsuccessful sales into successful sales. | SA-38 |
| See page 42 for Student Activity #39. | SA-39 |
| Have students complete Handout #1, IDECC Selling LAP 52, 895A. | SA-40 |
| Have the students complete Jeffrey's Department--A Retailing Simulation, Mini-Simulation 2, Incident 9. | SA-41 |
| See page 44 for Student Activity #42. | SA-42 |
| Show the slide-tape presentation F.U.D., Session #4, "Suggestive & Alternate Selling." (Refer to SA-3 for source). | SA-43 |
| Have students complete Pretest, IDECC Selling LAP 59, 809. | SA-44 |
| Have students complete Posttest, IDECC Selling LAP 56, 929A. | SA-45 |
| Have students complete Posttest, IDECC Selling LAP 57, 882A. | SA-46 |
| Have students complete Form #2, IDECC Selling LAP 57, 882A. | SA-47 |
| Have the students complete Jeffrey's Department Store--A Retailing Simulation, Mini-Simulation 2, Incident 10. | SA-48 |
| See page 45 for Student Activity #49. | SA-49 |
| Have the student read Selling Fashion Apparel, "Building a Clientele," pp. 67-68, 87. | SA-50 |
| See page 46 for Student Activity #51. | SA-51 |
| Have the students read Selling--Helping the Customer Buy, Ch. 14,"Sales Forms and Transactions," pp. 261-294. | SA-52 |
| Have the students complete Jeffrey's Department Store--A Retailing Simulation, Mini-Simulation 1, Incident 15. | SA-53 |
| See page 47 for Student Activity #54. | SA-54 |
| See page 48 for Student Activity #55. | SA-55 |
| Have the students read Apparel and Accessories, pp. 45-48. | SA-56 |
| See page 51 for Student Activity #57. | SA-57 |
| See page 53 for Student Activity #58. | SA-58 |
| See page 56 for Student Activity #59. | SA-59 |
| See page 59 for Student Activity #60. | SA-60 |
| See page 61 for Student Activity #61. | SA-61 |
| See page 62 for Student Activity #62. | SA-62 |
| See page 66 for Student Activity #63. | SA-63 |
| See page 68 for Student Activity #64. | SA-64 |
| Have the students complete Jeffrey's Department Store--A Retailing Simulation, Mini-Simulation 1, Incident 17. | SA-65 |
| See page 70 for Student Activity #66. | SA-66 |
| Have students complete Pretest and Posttest, IDECC Selling LAP 19, 879A. | SA-67 |
| See page 72 for Student Activity #68. | SA-68 |
| See page 76 for Student Activity #69. | SA-69 |
| See page 81 for Student Activity #70. | SA-70 |
| Obtain a teletrainer and handbook, Teletraining for Business, from the educational representative for your local Southern Bell Telephone Business Office. Have students complete "Selling by Telephone" practice calls, pp. 106-117. | SA-71 |
| Have students complete Pretest, IDECC Communications LAP 8, 156. | SA-72 |
| Have the students read Fundamentals of Selling, "Self-Service Merchandising," pp. 466-471. | SA-73 |
| See page 83 for Student Activity #74. | SA-74 |
| Have students complete Handout #4, IDECC Selling LAP 31, 869B. | SA-75 |

# PUBLIC RELATIONS WORKSHEET

1. List the name of a store in which you enjoy buying the following items and the name of a store in which you least enjoy shopping for the item.

| Product | Store Where You Would Purchase Product | Store Where You Would Not Purchase Product |
|---|---|---|
| a. Dress or girl's clothes | | |
| b. Men's slacks | | |
| c. Perfume or men's cologne | | |
| d. Jewelry | | |
| e. Shoes | | |
| f. Panty hose or socks | | |
| g. Underwear or lingerie | | |

2. List five stores you enjoy shopping in.

3. List five stores you don't enjoy shopping in.

4. Explain in writing why you listed each store in Questions 2 and 3. Consider whether or not the salespeople convey a positive image of themselves and the store.

5. For the five stores you said you didn't enjoy shopping in, give five public relations activities which might improve their image.

# WORKSHEET: WHAT COULD I ASK?

Directions: Listed below are four products associated with fashion merchandising. For each product you are to write three questions that could be used to better determine the customer's wants, desires, interests, etc. in a sales situation. In each question, please attempt to refer to the product you are working with.

PRODUCT #1: A bath robe

Question #1:

Question #2:

Question #3:

PRODUCT #2: A toddler's coat

Question #1:

Question #2:

Question #3:

PRODUCT #3: Diapers for an infant

Question #1:

Question #2:

Question #3:

PRODUCT #4: A pair of slacks

Question #1:

Question #2:

Question #3:

KEY: (Possible Questions)

A bath robe:
1. "Do you prefer a knee length or full length robe?"
2. "Is the robe for you or someone else?"
3. "What size robe do you need?"

A toddler's coat:
1. "Do you prefer a heavy coat or a lightweight coat?"
2. "What size does the child wear?"
3. "Will your child wear one of these coats with the hood attached?"

Diapers for an infant:
1. "Do you prefer cloth diapers or disposable diapers?"
2. "How much does the baby weigh?"
3. "Do you prefer the regular diaper or the pre-folded style?"

A pair of slacks:
1. "Do you prefer the elastic waistline or the fitted waistband?"
2. "What size slacks do you wear?"
3. "Are you interested in a solid color or pattern?"

# PRICES AND PRICE LINES

Directions: Answer the following questions about the comparison of prices and price lines.

1. Into what three categories do prices and price lines usually fall?

2. Give an example of distinct pricing.

3. Give an example of price ranges.

4. In what way can the salesperson be prepared to justify prices to the customers?

5. What price line should be shown first? Why?

KEY:

1. Low, medium, and high
2. Example: Hats at $5, $7.50, and $10 with all hats being one of these prices
3. Example: Wallets at $6 to $8, $10 to $12, and $14 to $16 with all wallets falling into one of these price ranges
4. By studying features and benefits of each price or line and preparing an explanation of differences in features between lines
5. Medium: allows opportunity to move upward or downward

# OBJECTIONS TO PRICE

Directions: From the following list, indicate those items which are ways of dealing with objections to price by placing an "X" in the blank to the left.

_____ 1. Immediately show lower-priced merchandise.

_____ 2. Point out hidden features.

_____ 3. Tell the customer the cheaper merchandise is in the budget department.

_____ 4. Emphasize the quality of the merchandise.

_____ 5. Apologize for the high price.

KEY:

_____ 1.

__X__ 2.

_____ 3.

__X__ 4.

_____ 5.

# HANDLING OBJECTIONS

Directions: Read the objection statements below. Determine the type of objection each is expressing, and provide a technique for handling the objection.

| Objection Statement | Type of Objection Being Displayed | Technique of Handling |
|---|---|---|
| 1. "I really haven't time to look at it now." | | |
| 2. "I don't think I'm interested." | | |
| 3. "I'm well supplied now." | | |
| 4. "I'll drop in and look at them tomorrow." | | |
| 5. "I can't decide now." | | |
| 6. "I must talk it over with my husband first." | | |
| 7. "It isn't quite what I was looking for." | | |
| 8. "I really don't need it yet." | | |
| 9. "It doesn't look like it should cost that much." | | |
| 10. "I don't have the money right now, I don't get paid until Friday." | | |

KEY: (Suggested Answers)

| | Type of Objection | Technique of Handling |
|---|---|---|
| 1. | Time | Close on an objection |
| 2. | Excuse or product | Question or explanation |
| 3. | Need | Yes, but or close on an objection |
| 4. | Time | Close on an objection |
| 5. | Time | Question |
| 6. | Time | Question |
| 7. | Product | Question |
| 8. | Time or need | Question |
| 9. | Price or quality | Superior point or yes, but |
| 10. | Time, convenience | Close on an objection |

# OBJECTION ANALYSIS

Directions: To assist in anticipating objections and dealing with them before they are expressed, salespeople sometimes do an objection analysis. In this activity, the salesperson would study an item of merchandise to learn its features and benefits, then make a list of all possible objections he/she can think of that might be expressed. For each possible objection, he/she would then plan the sales presentation to include positive sales statements for each. Using the format below, complete an objection analysis for this item of merchandise, giving the possible types of objections, a possible objection statement for each type, and a suggested answer for each.

ITEM: Misses dress, sleeveless shift, 65% dacron/35% cotton, brightly colored print, neatly tailored, back zipper, two side pockets, 100% polyester trim. $19.99.

| TYPE OF OBJECTION | POSSIBLE OBJECTION STATEMENT | SUGGESTED ANSWER |
|---|---|---|
| Example: | | |
| Price | "The price is rather low. Is it a lower quality dress?" | "It is an excellent value because we bought a large quantity, but it has the same high quality workmanship as our more expensive shift dresses." |

# CLOSING THE SALE

Directions: Statements made by customers may be clues for the salesperson to attempt to close the sale. Using the form below, write out which method of closing you would use and an example of what you would say.

1. Customer: "I like this suit, but I want my wife to see it before I make a final decision."

   Method you would use to close: ____________________

   Example of your close: ____________________

   ____________________

2. Customer: "These are all pretty, but I still like the first one I tried on."

   Method you would use to close: ____________________

   Example of your close: ____________________

   ____________________

3. Customer: "Do you think this color will look okay on me?"

   Method you would use to close: ____________________

   Example of your close: ____________________

   ____________________

4. Customer: "I'm buying this bracelet as a gift for my neice. Do you think she will like white gold?"

   Method you would use to close: ____________________

   Example of your close: ____________________

   ____________________

5. Customer: "I like this dress, but the price is more than I can afford." (The customer looks at a similar style that is less expensive.)

   Method you would use to close: ____________________

   Example of your close: ____________________

   ____________________

KEY: (Suggested answers)

1. Last-chance-to-buy close: "The color and style are really very flattering to you, Mr. Brown, and I am sure Mrs. Brown would be quite pleased. It is the last suit in this color and style in your size, and I'm sure you would be disappointed if it is sold before your wife could come in with you. Shall I go ahead and write it up for you?"
2. Suggest-related-merchandise close: "You are absolutely right, Mrs. Lowe. This scarf will accent the sweater and add even more beauty to the hand-carved buttons."

KEY: (Continued)

3. Choice close: "The green does look nice on you and brings out the color of your eyes. Do you like the green better than the blue?"
4. Minor point close: "I'm sure your neice will like the white gold. Many items of fine jewelry combine white and yellow gold. Would you like to have the bracelet gift wrapped?"
5. Choice close: "This dress is the same color and follows the same style. It is $8 less than the other. Would you like to try it on?"

# DEPARTURE STATEMENTS

Directions: For each of the following purchases, write an appropriate departure statement, using the principles of thanking the customer, reassuring the customer, and asking him/her to return.

1. Mrs. Jones purchased a mint green blouse to wear with a suit she received for her birthday.

2. Mr. Taylor (a young bachelor) purchased a new suede-trimmed suit to wear on a business trip to Chicago.

3. Jeffrey purchased a wallet for his father for Father's Day.

4. Mrs. Howard purchased a layette for a baby shower gift for her daughter-in-law.

5. Mrs. Thompson purchased a pair of jeans for Timmy to wear to kindergarten.

KEY: (Suggested Answers)

1. "I'm sure your new blouse will make your birthday present even more special. Thank you for shopping at Logan's. Come back again soon."
2. "I hope you will enjoy your new suit and your trip to Chicago. Thank you."
3. "Your father will be very pleased with this gift. Thank you, Jeffrey, and I look forward to helping you again soon."
4. "I'm sure your daughter-in-law will be pleased with the layette. Thank you for shopping Logan's. Come in again soon."
5. "I'm sure you will be pleased with the way these jeans wear. Bring Timmy in again soon. Thank you."

# TRADING-UP

Directions: Answer the following questions regarding trading-up.

1. Define "trading-up."

2. List the techniques to be used when trading-up.

3. Why is it important to focus the customer's attention on the additional features of the better item?

4. What is the most important factor the salesperson should consider before attempting to trade-up?

5. Why should the salesperson point out similar features in both items?

KEY:

1. The process of attempting to interest the customer in better quality higher priced merchandise.
2. (a) Use when you determine the customer would benefit from the better merchandise.
   (b) Point out similar features in the two items.
   (c) Point out additional features and benefits to justify extra cost.
   (d) Do not belittle lower-priced merchandise.
   (e) Do not pressure the customer into buying the better article.
3. The additional features help convince the customer to buy and justify the higher price.
4. The customer's intended use of the merchandise.
5. The similar features help the customer to feel you are not trying to sell something he/she did not request--the similar features show that this item relates to or is comparable to the first.

# BUILDING CLIENTELE

Directions: Answer the following questions about building clientele.

1. List at least two techniques to use in building clientele.

2. List at least five kinds of information which should be recorded in your customer card file or book.

3. List at least three uses of a customer card file or book.

KEY:

1. (Two of these)
   (a) Present business cards with your name on them to customers you hope to serve again
   (b) Maintain customer card file or book
   (c) Know your customers and your merchandise
   (d) Call customers by name
   (e) Use card file or book to call customers about specific items, etc.
2. (Five of these)
   (a) Customer's name
   (b) Address
   (c) Telephone number
   (d) Size
   (e) Other members of family--name, age, sex
   (f) Color, quality, design preferences
   (g) Special interests
   (h) Occupation
3. (Three of these)
   (a) To inform customer of merchandise of interest to him/her
   (b) To see if customer is running low on a particular item
   (c) To tell customer a requested item has arrived
   (d) To offer merchandise for a special occasion
   (e) To tell customer a desired item is reduced

## CHARGE AND CASH TRANSACTIONS

I. Define the following terms:

1. Cash-send
2. Cash-take
3. Charge-send
4. Charge-take
5. Credit limit
6. Receipt of purchase

II. List the procedures for processing a charge sale.

III. What information is optional on a cash sales form but is required on a charge sales form?

KEY:

I. Cash-send--customer pays for items and has them delivered
Cash-take--customer pays for items and takes them with him/her
Charge-send--customer charges items and has them delivered
Charge-take--customer charges items and takes them with him/her
Credit limit--the maximum amount of credit allowed on an account
Receipt of purchase--cash register tape or sales form

II.
1. Obtain credit card
2. Check invalid list
3. Ring purchase--subtotal, tax, total
4. Fill in charge sales slip
5. Stamp charge form with credit card
6. Obtain customer signature
7. Compare signature to credit card
8. Return card to customer
9. Obtain credit approval
10. Give customer copy of sales slip
11. Bag merchandise
12. Thank customer

III.
1. Customer name
2. Address

# CALCULATING SALES

I. Find the amount to be charged for these items:

1. 3 shirts @ $12.98 each = ________
2. 2 blouses @ $8.95 each = ________
3. 2 ties @ $5.99 each = ________
4. 4 scarves @ $3.49 each = ________
5. 3 pair of gloves @ $4.75 each = ________

II. Find the amount which should be charged for one, two, and three of the following items that are multiple-priced:

| | One | Two | Three |
|---|---|---|---|
| 1. 3/$15.98 | | | |
| 2. 6/$24.99 | | | |
| 3. 5/$12.49 | | | |
| 4. 3/$19.95 | | | |
| 5. $25/dozen | | | |

III. Manually compute tax on the following amount using a 4% tax rate:

1. $4.27 = ________
2. $13.63 = ________
3. $47.63 = ________
4. $27.00 = ________
5. $33.33 = ________

IV. Using the tax chart, find tax on the following:

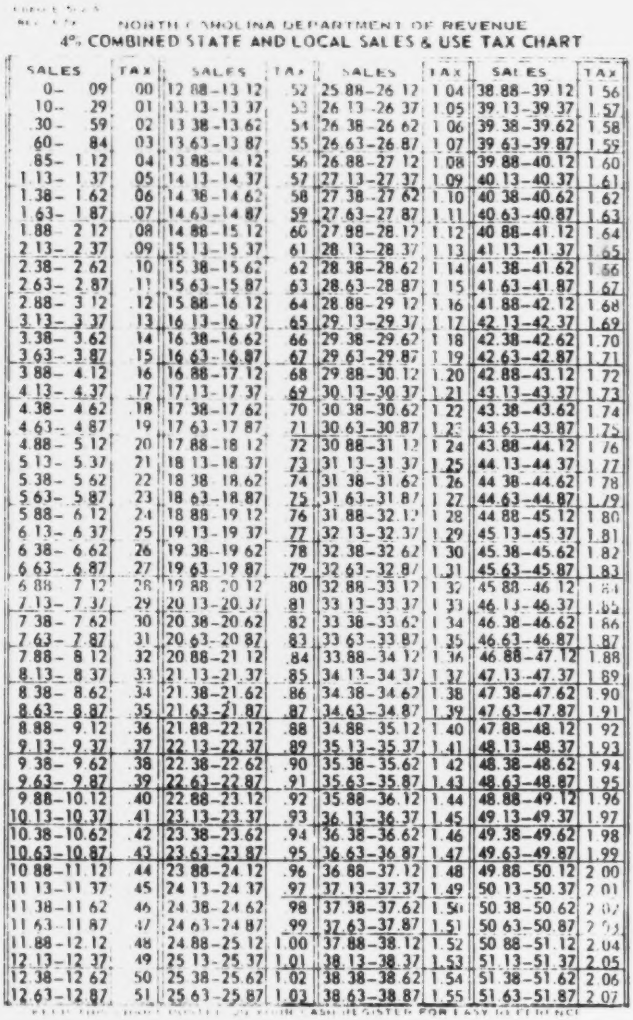
1. $5.17 = ________
2. $49.31 = ________
3. $25.84 = ________
4. $40.99 = ________
5. $1.61 = ________

V. Extend, subtotal, find tax (4%), and total the following orders:

1. 1 shirt @ 3/$18.95 ________
   1 pair pants @ $21.00 ________
   3 pair socks @ 3/$4.79 ________
   1 wallet @ $18.50 ________
   2 ties @ $4.99 ________
   1 belt @ $5.95 ________
   Subtotal ________
   4% Tax ________
   Total ________

2. 1 blouse @ 2/$25.95
   1 skirt @ $23.00
   2 pair hose @ 2/$2.50
   1 belt @ $4.75
   2 pins @ $7.99

Subtotal
4% Tax
Total



NORTH CAROLINA DEPARTMENT OF REVENUE

4% COMBINED STATE AND LOCAL SALES & USE TAX CHART

| SALES | TAX | SALES | TAX | SALES | TAX | SALES | TAX |
|---|---|---|---|---|---|---|---|
| 0– .09 | .00 | 12.88–13.12 | .52 | 25.88–26.12 | 1.04 | 38.88–39.12 | 1.56 |
| .10– .29 | .01 | 13.13–13.37 | .53 | 26.13–26.37 | 1.05 | 39.13–39.37 | 1.57 |
| .30– .59 | .02 | 13.38–13.62 | .54 | 26.38–26.62 | 1.06 | 39.38–39.62 | 1.58 |
| .60– .84 | .03 | 13.63–13.87 | .55 | 26.63–26.87 | 1.07 | 39.63–39.87 | 1.59 |
| .85– 1.12 | .04 | 13.88–14.12 | .56 | 26.88–27.12 | 1.08 | 39.88–40.12 | 1.60 |
| 1.13– 1.37 | .05 | 14.13–14.37 | .57 | 27.13–27.37 | 1.09 | 40.13–40.37 | 1.61 |
| 1.38– 1.62 | .06 | 14.38–14.62 | .58 | 27.38–27.62 | 1.10 | 40.38–40.62 | 1.62 |
| 1.63– 1.87 | .07 | 14.63–14.87 | .59 | 27.63–27.87 | 1.11 | 40.63–40.87 | 1.63 |
| 1.88– 2.12 | .08 | 14.88–15.12 | .60 | 27.88–28.12 | 1.12 | 40.88–41.12 | 1.64 |
| 2.13– 2.37 | .09 | 15.13–15.37 | .61 | 28.13–28.37 | 1.13 | 41.13–41.37 | 1.65 |
| 2.38– 2.62 | .10 | 15.38–15.62 | .62 | 28.38–28.62 | 1.14 | 41.38–41.62 | 1.66 |
| 2.63– 2.87 | .11 | 15.63–15.87 | .63 | 28.63–28.87 | 1.15 | 41.63–41.87 | 1.67 |
| 2.88– 3.12 | .12 | 15.88–16.12 | .64 | 28.88–29.12 | 1.16 | 41.88–42.12 | 1.68 |
| 3.13– 3.37 | .13 | 16.13–16.37 | .65 | 29.13–29.37 | 1.17 | 42.13–42.37 | 1.69 |
| 3.38– 3.62 | .14 | 16.38–16.62 | .66 | 29.38–29.62 | 1.18 | 42.38–42.62 | 1.70 |
| 3.63– 3.87 | .15 | 16.63–16.87 | .67 | 29.63–29.87 | 1.19 | 42.63–42.87 | 1.71 |
| 3.88– 4.12 | .16 | 16.88–17.12 | .68 | 29.88–30.12 | 1.20 | 42.88–43.12 | 1.72 |
| 4.13– 4.37 | .17 | 17.13–17.37 | .69 | 30.13–30.37 | 1.21 | 43.13–43.37 | 1.73 |
| 4.38– 4.62 | .18 | 17.38–17.62 | .70 | 30.38–30.62 | 1.22 | 43.38–43.62 | 1.74 |
| 4.63– 4.87 | .19 | 17.63–17.87 | .71 | 30.63–30.87 | 1.23 | 43.63–43.87 | 1.75 |
| 4.88– 5.12 | .20 | 17.88–18.12 | .72 | 30.88–31.12 | 1.24 | 43.88–44.12 | 1.76 |
| 5.13– 5.37 | .21 | 18.13–18.37 | .73 | 31.13–31.37 | 1.25 | 44.13–44.37 | 1.77 |
| 5.38– 5.62 | .22 | 18.38–18.62 | .74 | 31.38–31.62 | 1.26 | 44.38–44.62 | 1.78 |
| 5.63– 5.87 | .23 | 18.63–18.87 | .75 | 31.63–31.87 | 1.27 | 44.63–44.87 | 1.79 |
| 5.88– 6.12 | .24 | 18.88–19.12 | .76 | 31.88–32.12 | 1.28 | 44.88–45.12 | 1.80 |
| 6.13– 6.37 | .25 | 19.13–19.37 | .77 | 32.13–32.37 | 1.29 | 45.13–45.37 | 1.81 |
| 6.38– 6.62 | .26 | 19.38–19.62 | .78 | 32.38–32.62 | 1.30 | 45.38–45.62 | 1.82 |
| 6.63– 6.87 | .27 | 19.63–19.87 | .79 | 32.63–32.87 | 1.31 | 45.63–45.87 | 1.83 |
| 6.88– 7.12 | .28 | 19.88–20.12 | .80 | 32.88–33.12 | 1.32 | 45.88–46.12 | 1.84 |
| 7.13– 7.37 | .29 | 20.13–20.37 | .81 | 33.13–33.37 | 1.33 | 46.13–46.37 | 1.85 |
| 7.38– 7.62 | .30 | 20.38–20.62 | .82 | 33.38–33.62 | 1.34 | 46.38–46.62 | 1.86 |
| 7.63– 7.87 | .31 | 20.63–20.87 | .83 | 33.63–33.87 | 1.35 | 46.63–46.87 | 1.87 |
| 7.88– 8.12 | .32 | 20.88–21.12 | .84 | 33.88–34.12 | 1.36 | 46.88–47.12 | 1.88 |
| 8.13– 8.37 | .33 | 21.13–21.37 | .85 | 34.13–34.37 | 1.37 | 47.13–47.37 | 1.89 |
| 8.38– 8.62 | .34 | 21.38–21.62 | .86 | 34.38–34.67 | 1.38 | 47.38–47.62 | 1.90 |
| 8.63– 8.87 | .35 | 21.63–21.87 | .87 | 34.63–34.87 | 1.39 | 47.63–47.87 | 1.91 |
| 8.88– 9.12 | .36 | 21.88–22.12 | .88 | 34.88–35.12 | 1.40 | 47.88–48.12 | 1.92 |
| 9.13– 9.37 | .37 | 22.13–22.37 | .89 | 35.13–35.37 | 1.41 | 48.13–48.37 | 1.93 |
| 9.38– 9.62 | .38 | 22.38–22.62 | .90 | 35.38–35.62 | 1.42 | 48.38–48.62 | 1.94 |
| 9.63– 9.87 | .39 | 22.63–22.87 | .91 | 35.63–35.87 | 1.43 | 48.63–48.87 | 1.95 |
| 9.88–10.12 | .40 | 22.88–23.12 | .92 | 35.88–36.12 | 1.44 | 48.88–49.12 | 1.96 |
| 10.13–10.37 | .41 | 23.13–23.37 | .93 | 36.13–36.37 | 1.45 | 49.13–49.37 | 1.97 |
| 10.38–10.62 | .42 | 23.38–23.62 | .94 | 36.38–36.62 | 1.46 | 49.38–49.62 | 1.98 |
| 10.63–10.87 | .43 | 23.63–23.87 | .95 | 36.63–36.87 | 1.47 | 49.63–49.87 | 1.99 |
| 10.88–11.12 | .44 | 23.88–24.12 | .96 | 36.88–37.12 | 1.48 | 49.88–50.12 | 2.00 |
| 11.13–11.37 | .45 | 24.13–24.37 | .97 | 37.13–37.37 | 1.49 | 50.13–50.37 | 2.01 |
| 11.38–11.62 | .46 | 24.38–24.62 | .98 | 37.38–37.62 | 1.50 | 50.38–50.62 | 2.02 |
| 11.63–11.87 | .47 | 24.63–24.87 | .99 | 37.63–37.87 | 1.51 | 50.63–50.87 | 2.03 |
| 11.88–12.12 | .48 | 24.88–25.12 | 1.00 | 37.88–38.12 | 1.52 | 50.88–51.12 | 2.04 |
| 12.13–12.37 | .49 | 25.13–25.37 | 1.01 | 38.13–38.37 | 1.53 | 51.13–51.37 | 2.05 |
| 12.38–12.62 | .50 | 25.38–25.62 | 1.02 | 38.38–38.62 | 1.54 | 51.38–51.62 | 2.06 |
| 12.63–12.87 | .51 | 25.63–25.87 | 1.03 | 38.63–38.87 | 1.55 | 51.63–51.87 | 2.07 |

[illegible] CASH REGISTER FOR EASY REFERENCE

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KEY:

I. 1. $38.94
2. $17.90
3. $11.98
4. $13.96
5. $14.25

II.

| | One | Two | Three |
|---|---|---|---|
| 1. | $5.33 | $10.66 | $15.98 |
| 2. | 4.17 | 8.34 | 12.51 |
| 3. | 2.50 | 5.00 | 7.50 |
| 4. | 6.65 | 13.30 | 19.95 |
| 5. | 2.09 | 4.18 | 6.27 |

III. 1. $ .17
2. .55
3. 1.91
4. 1.08
5. 1.33

IV. 1. $ .21
2. 1.97
3. 1.03
4. 1.64
5. .06

V.

| 1. | | 2. | |
|---|---|---|---|
| | $ 6.32 | | $ 12.98 |
| | 21.00 | | 23.00 |
| | 4.79 | | 2.50 |
| | 18.50 | | 4.75 |
| | 9.98 | | 15.98 |
| | 5.95 | | 59.21 |
| | 66.54 | | 2.37 |
| | 2.66 | | $ 61.58 |
| | $ 69.20 | | |

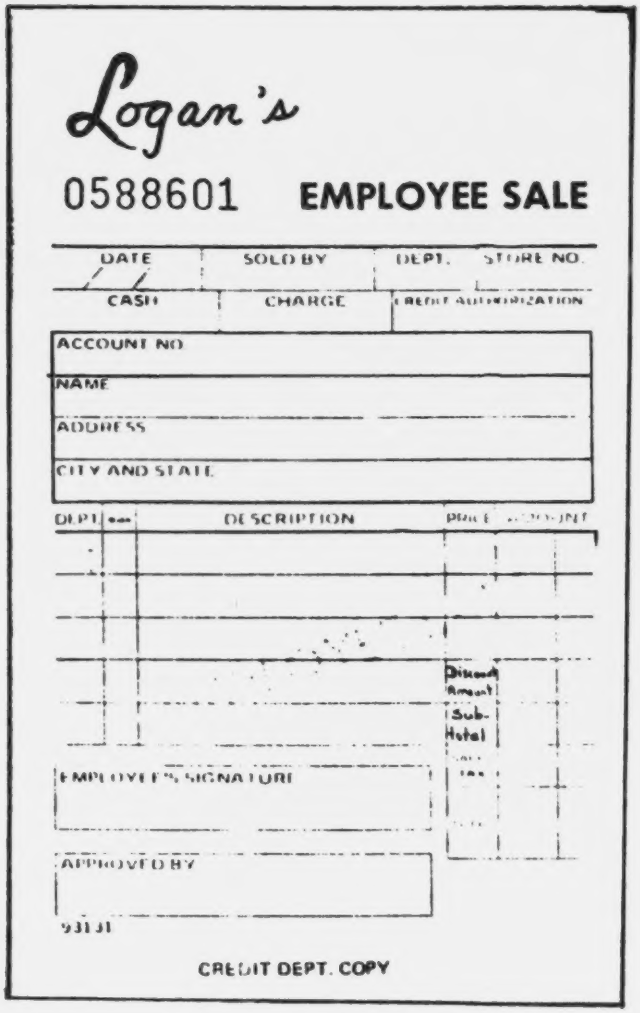
## EMPLOYEE DISCOUNT

Directions: Fill in and compute the total on the Employee Sales Form using the following information: Dept. 5., Store No. 1, Cash Sale.

The employee is Susan Jones, 1204 Westwood Lane, Wilkesboro, NC 28697. Her account no. is 851595. Her purchases are:

1 pair Logan's jeans, size 9, $19.95, Dept. 5
1 western plaid shirt, size medium, $15.98, Dept. 5
2 pair knee socks, $2.19 each, Dept. 6

The sales tax rate is 4%. She will receive a 20% discount on the jeans and shirt and a 15% discount on the socks.



Logan's

0588601 **EMPLOYEE SALE**

| DATE | SOLD BY | DEPT. | STORE NO. |
|---|---|---|---|
| / / | | | |

| CASH | CHARGE | CREDIT AUTHORIZATION |
|---|---|---|
| | | |

ACCOUNT NO

NAME

ADDRESS

CITY AND STATE

| DEPT | | DESCRIPTION | PRICE | AMOUNT |
|---|---|---|---|---|
| | | | | |
| | | | | |
| | | | | |
| | | | Discount Amount | |
| | | | Sub-total | |
| | | | SALES TAX | |
| | | | TOTAL | |

EMPLOYEE'S SIGNATURE

APPROVED BY

93131

CREDIT DEPT. COPY

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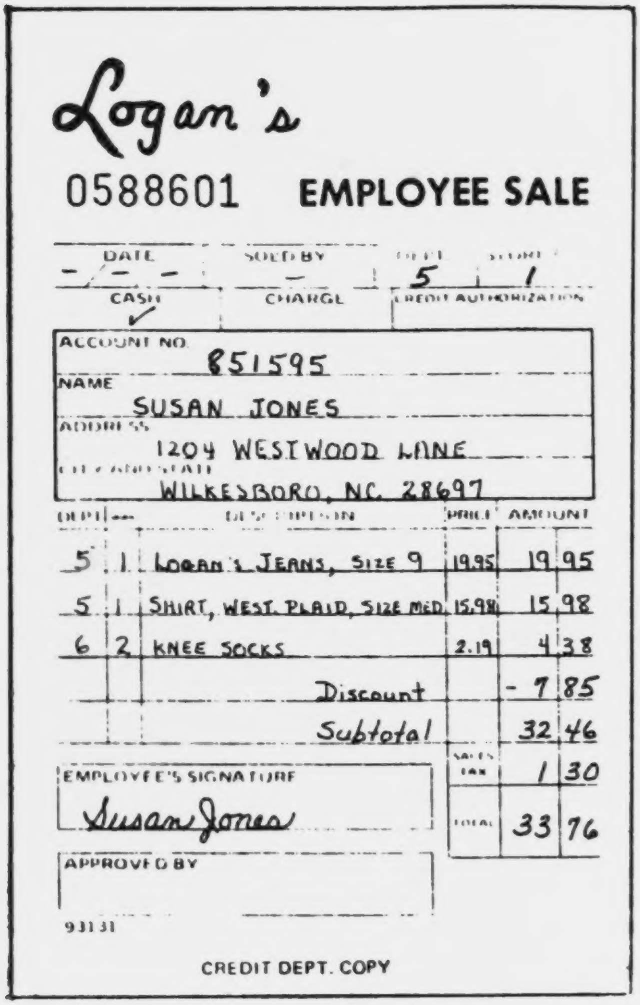
KEY:



Logan's

0588601 **EMPLOYEE SALE**

| DATE | SOLD BY | DEPT. | STORE |
|---|---|---|---|
| - / - - | - | 5 | 1 |

| CASH | CHARGE | CREDIT AUTHORIZATION |
|---|---|---|
| ✓ | | |

ACCOUNT NO. 851595
NAME SUSAN JONES
ADDRESS 1204 WESTWOOD LANE
CITY AND STATE WILKESBORO, NC. 28697

| DEPT. | [illegible] | DESCRIPTION | PRICE | AMOUNT | |
|---|---|---|---|---|---|
| 5 | 1 | LOGAN'S JEANS, SIZE 9 | 19.95 | 19 | 95 |
| 5 | 1 | SHIRT, WEST. PLAID, SIZE MED. | 15.98 | 15 | 98 |
| 6 | 2 | KNEE SOCKS | 2.19 | 4 | 38 |
| | | Discount | | - 7 | 85 |
| | | Subtotal | | 32 | 46 |
| | | | SALES TAX | 1 | 30 |
| | | | TOTAL | 33 | 76 |

EMPLOYEE'S SIGNATURE Susan Jones

APPROVED BY

93131

CREDIT DEPT. COPY

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# DELIVERY CHARGES

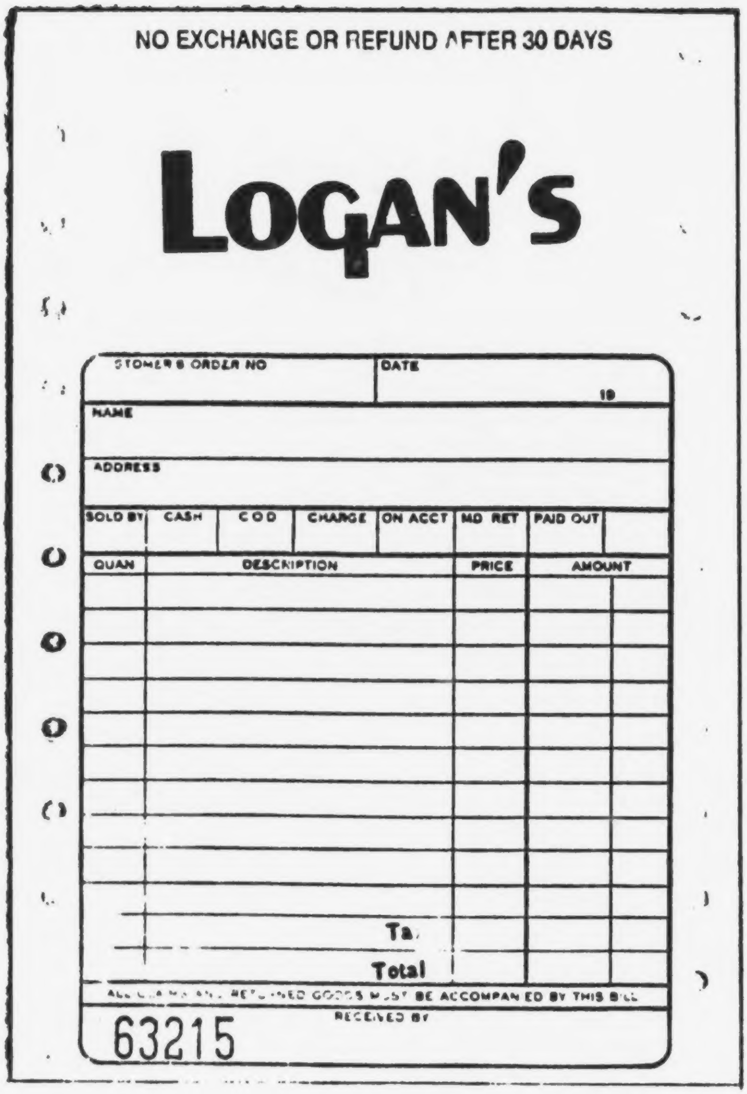
Directions: Fill in the sales form for the following charge purchase. The order is to be shipped to Mr. & Mrs. Roland Canter, 109 Highland Street, Boone, NC 28607. Using the parcel post chart, compute the delivery charge and add to the sales total.

2 one-piece sleepers @ $7.29
1 infant bunting bag @ $24.98
1 infant layette @ $29.95

Sales tax rate is 4%. Total weight of prepared package is 6 1/3 lbs. Boone is in Zone 1.

PARCEL POST ZONE RATES

| Weight--not exceeding (lbs.) | Local | 1 & 2 | 3 | 4 | 5 |
|---|---|---|---|---|---|
| 2 | .75 | .88 | .91 | 1.02 | 1.13 |
| 3 | .80 | .95 | 1.00 | 1.13 | 1.27 |
| 4 | .84 | 1.02 | 1.08 | 1.23 | 1.40 |
| 5 | .89 | 1.09 | 1.17 | 1.34 | 1.54 |
| 6 | .93 | 1.16 | 1.25 | 1.44 | 1.67 |
| 7 | .98 | 1.23 | 1.34 | 1.55 | 1.81 |
| 8 | 1.02 | 1.30 | 1.42 | 1.65 | 1.94 |
| 9 | 1.07 | 1.37 | 1.51 | 1.76 | 2.08 |
| 10 | 1.12 | 1.44 | 1.60 | 1.87 | 2.22 |



NO EXCHANGE OR REFUND AFTER 30 DAYS

**LOGAN'S**

| | |
|---|---|
| STOMER'S ORDER NO | DATE 19 |
| NAME | |
| ADDRESS | |

| SOLD BY | CASH | C O D | CHARGE | ON ACCT | MD RET | PAID OUT | |
|---|---|---|---|---|---|---|---|
| | | | | | | | |

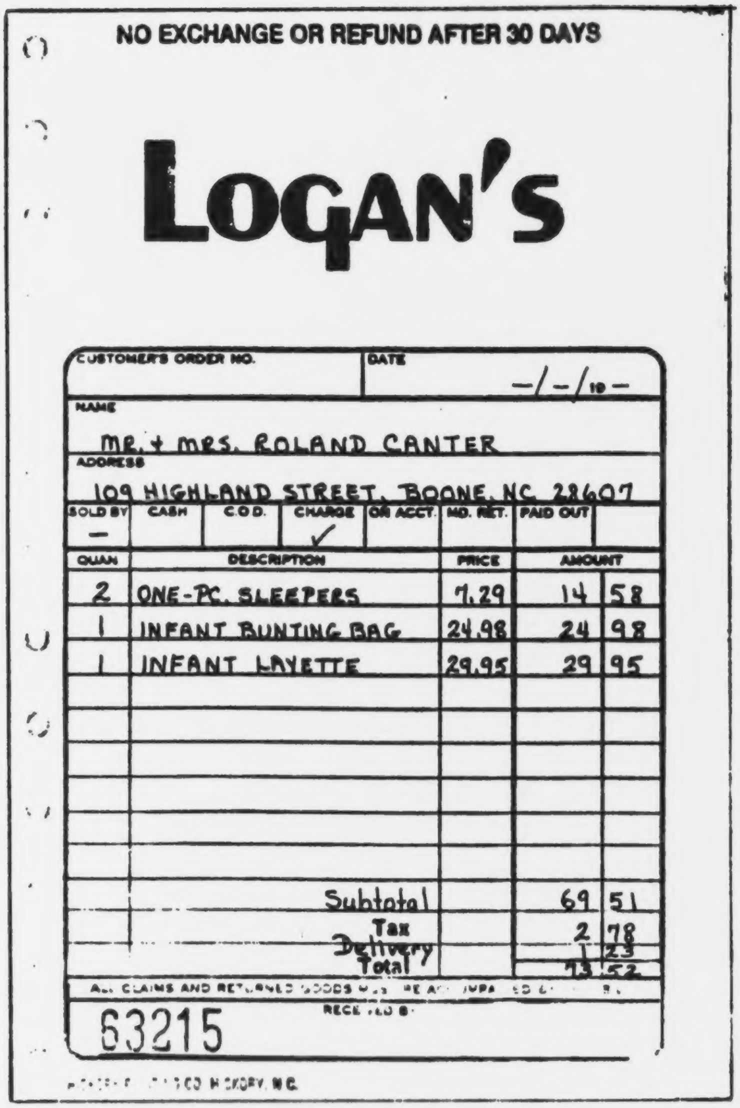
| QUAN | DESCRIPTION | PRICE | AMOUNT | |
|---|---|---|---|---|
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | Tax | | | |
| | Total | | | |

ALL CLAIMS AND RETURNED GOODS MUST BE ACCOMPANIED BY THIS BILL

63215

RECEIVED BY

KEY:



**NO EXCHANGE OR REFUND AFTER 30 DAYS**

**LOGAN'S**

CUSTOMER'S ORDER NO.

DATE –/–/19–

NAME MR. + MRS. ROLAND CANTER

ADDRESS 109 HIGHLAND STREET, BOONE, NC 28607

| SOLD BY | CASH | C.O.D. | CHARGE | ON ACCT. | MD. RET. | PAID OUT | |
|---|---|---|---|---|---|---|---|
| — | | | ✓ | | | | |

| QUAN | DESCRIPTION | PRICE | AMOUNT | |
|---|---|---|---|---|
| 2 | ONE-PC. SLEEPERS | 7.29 | 14 | 58 |
| 1 | INFANT BUNTING BAG | 24.98 | 24 | 98 |
| 1 | INFANT LAYETTE | 29.95 | 29 | 95 |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | Subtotal | | 69 | 51 |
| | Tax | | 2 | 78 |
| | Delivery | | 1 | 23 |
| | Total | | 73 | 52 |

ALL CLAIMS AND RETURNED GOODS MUST BE ACCOMPANIED BY [illegible]

63215 RECEIVED BY

[illegible] CO HICKORY, N.C.

# ALTERATION CHARGES

Directions: Complete the following charge sale form including the alteration charges. Fill in the alteration ticket.

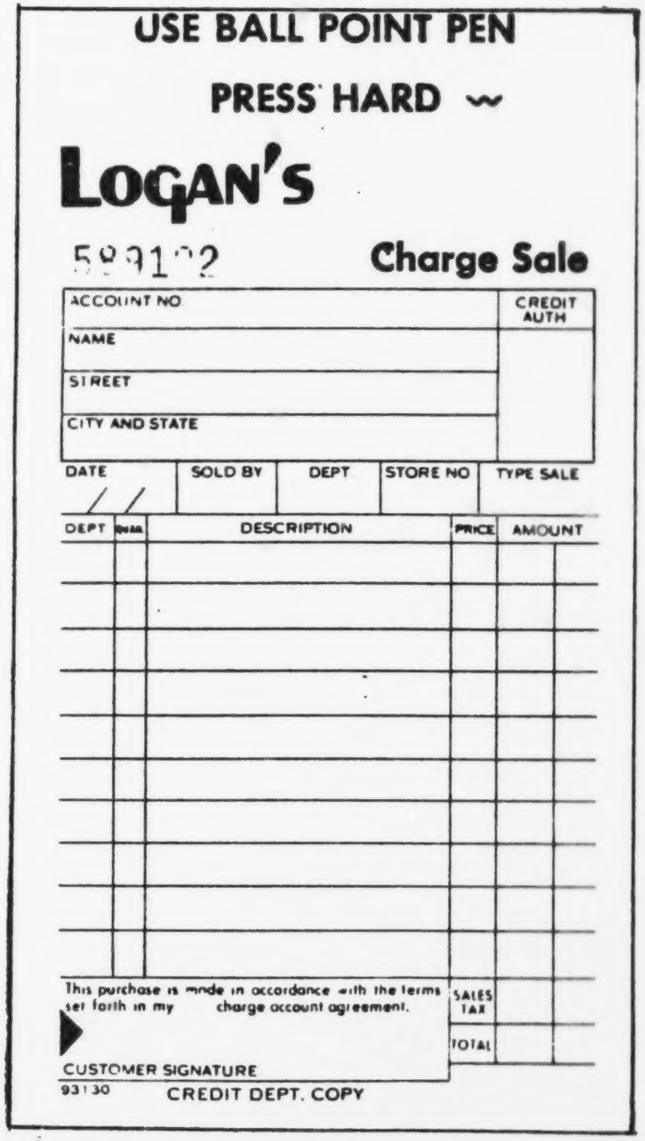
Account No.: 541-15
Jeremiah Taylor
Route 5, Box 92
Wilkesboro, NC 28697
Telephone: 838-2000

Dept. 5, Store No. 1, Tax Rate 4%

1 shirt, lt. blue, style 501, size 16-32, $16.98
1 pair pants, med. blue, style 925, size 34, $20.00

The shirt sleeve cuffs are to be loosened by setting the button over 1/2 inch to the outside--alteration fee $1.00. The pants are to be hemmed to an inseam length of 31 inches--alteration fee $1.50. Mr. Taylor would like to pick up these items at 4 p.m. on the day following the purchase.

SA-59



**USE BALL POINT PEN**

**PRESS HARD**

**LOGAN'S**

589122 **Charge Sale**

| | |
|---|---|
| ACCOUNT NO | CREDIT AUTH |
| NAME | |
| STREET | |
| CITY AND STATE | |

| DATE | SOLD BY | DEPT | STORE NO | TYPE SALE |
|---|---|---|---|---|
| / / | | | | |

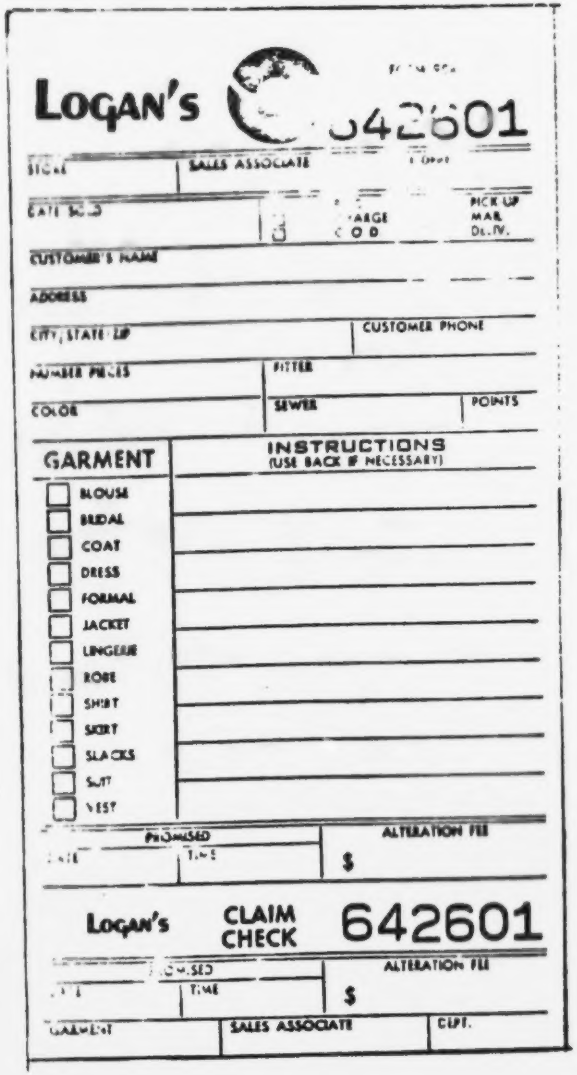
| DEPT | QUAN | DESCRIPTION | PRICE | AMOUNT |
|---|---|---|---|---|
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | SALES TAX | |
| | | | TOTAL | |

This purchase is made in accordance with the terms set forth in my charge account agreement.

▶

CUSTOMER SIGNATURE

93130 CREDIT DEPT. COPY



**LOGAN'S** 642601

| | | |
|---|---|---|
| STORE | SALES ASSOCIATE | |
| DATE SOLD | CHARGE<br>C O D | PICK UP<br>MAIL<br>DELIV. |
| CUSTOMER'S NAME | | |
| ADDRESS | | |
| CITY, STATE ZIP | CUSTOMER PHONE | |
| NUMBER PIECES | FITTER | |
| COLOR | SEWER | POINTS |

| GARMENT | INSTRUCTIONS (USE BACK IF NECESSARY) |
|---|---|
| ☐ BLOUSE | |
| ☐ BRIDAL | |
| ☐ COAT | |
| ☐ DRESS | |
| ☐ FORMAL | |
| ☐ JACKET | |
| ☐ LINGERIE | |
| ☐ ROBE | |
| ☐ SHIRT | |
| ☐ SKIRT | |
| ☐ SLACKS | |
| ☐ SUIT | |
| ☐ VEST | |

| PROMISED | | ALTERATION FEE |
|---|---|---|
| DATE | TIME | $ |

**LOGAN'S** **CLAIM CHECK** 642601

| PROMISED | | ALTERATION FEE |
|---|---|---|
| DATE | TIME | $ |

| GARMENT | SALES ASSOCIATE | DEPT. |
|---|---|---|
| | | |

Personal Selling
57

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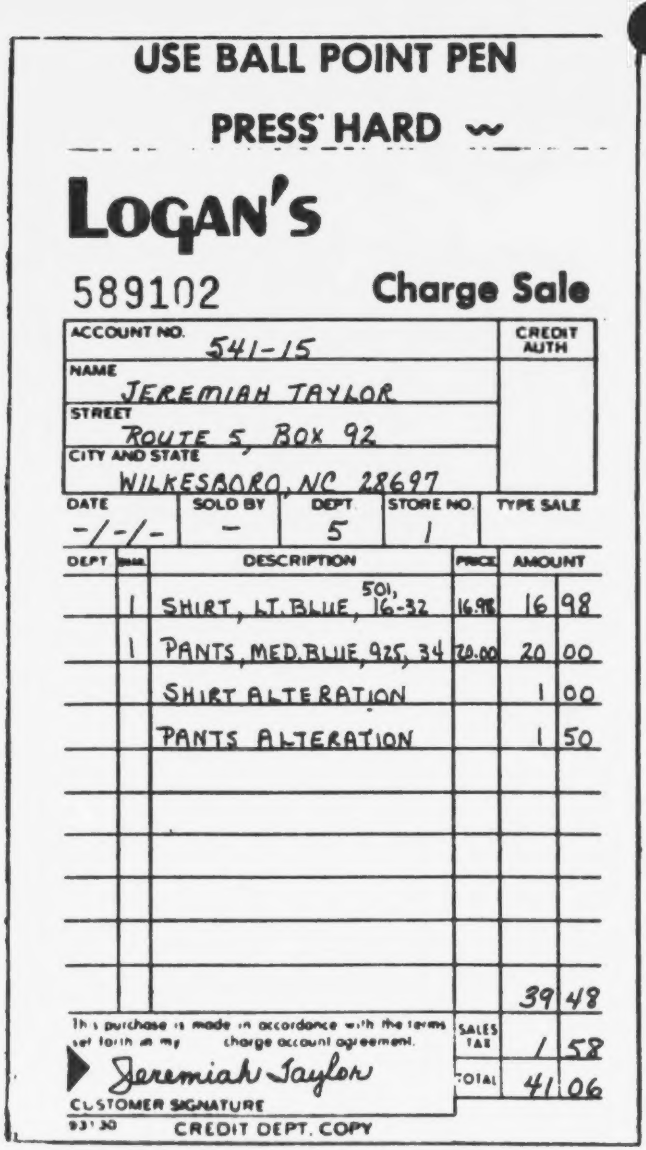
SA-59



**USE BALL POINT PEN**

**PRESS HARD**

## LOGAN'S

589102 **Charge Sale**

ACCOUNT NO. 541-15

CREDIT AUTH

NAME JEREMIAH TAYLOR

STREET ROUTE 5, BOX 92

CITY AND STATE WILKESBORO, NC 28697

| DATE | SOLD BY | DEPT. | STORE NO. | TYPE SALE |
|---|---|---|---|---|
| -/-/- | - | 5 | 1 | |

| DEPT | QUAN. | DESCRIPTION | PRICE | AMOUNT | |
|---|---|---|---|---|---|
| | 1 | SHIRT, LT. BLUE, 501, 16-32 | 16.98 | 16 | 98 |
| | 1 | PANTS, MED. BLUE, 925, 34 | 20.00 | 20 | 00 |
| | | SHIRT ALTERATION | | 1 | 00 |
| | | PANTS ALTERATION | | 1 | 50 |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | 39 | 48 |
| | | | SALES TAX | 1 | 58 |
| | | | TOTAL | 41 | 06 |

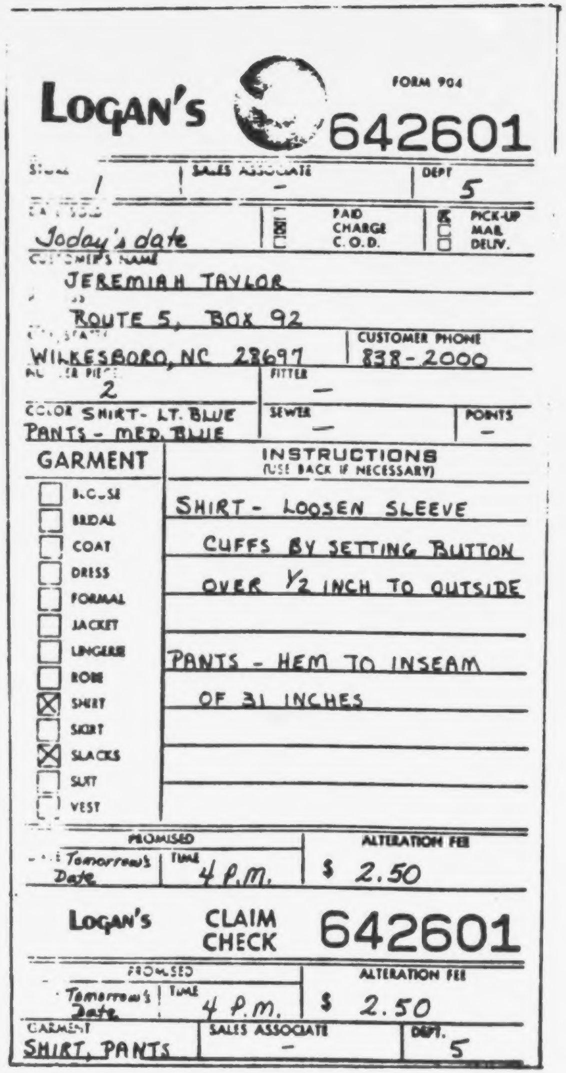
This purchase is made in accordance with the terms set forth in my charge account agreement.

Jeremiah Taylor

CUSTOMER SIGNATURE

93'30 CREDIT DEPT. COPY

KEY:



**LOGAN'S** 642601

FORM 904

| STORE | SALES ASSOCIATE | DEPT |
|---|---|---|
| 1 | - | 5 |

DATE SOLD Today's date

☐ PAID
☒ CHARGE
☐ C.O.D.

☒ PICK-UP
☐ MAIL
☐ DELIV.

CUSTOMER'S NAME JEREMIAH TAYLOR

ROUTE 5, BOX 92

CITY, STATE WILKESBORO, NC 28697

CUSTOMER PHONE 838-2000

NUMBER PIECES 2

FITTER -

COLOR SHIRT - LT. BLUE PANTS - MED. BLUE

SEWER -

POINTS -

**GARMENT**

☐ BLOUSE
☐ BRIDAL
☐ COAT
☐ DRESS
☐ FORMAL
☐ JACKET
☐ LINGERIE
☐ ROBE
☒ SHIRT
☐ SKIRT
☒ SLACKS
☐ SUIT
☐ VEST

**INSTRUCTIONS** (USE BACK IF NECESSARY)

SHIRT - LOOSEN SLEEVE CUFFS BY SETTING BUTTON OVER 1/2 INCH TO OUTSIDE

PANTS - HEM TO INSEAM OF 31 INCHES

PROMISED DATE Tomorrow's Date TIME 4 P.M.

ALTERATION FEE $ 2.50

**LOGAN'S** CLAIM CHECK 642601

PROMISED DATE Tomorrow's Date TIME 4 P.M.

ALTERATION FEE $ 2.50

GARMENT SHIRT, PANTS

SALES ASSOCIATE -

DEPT. 5

Personal Selling 58

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SA-60

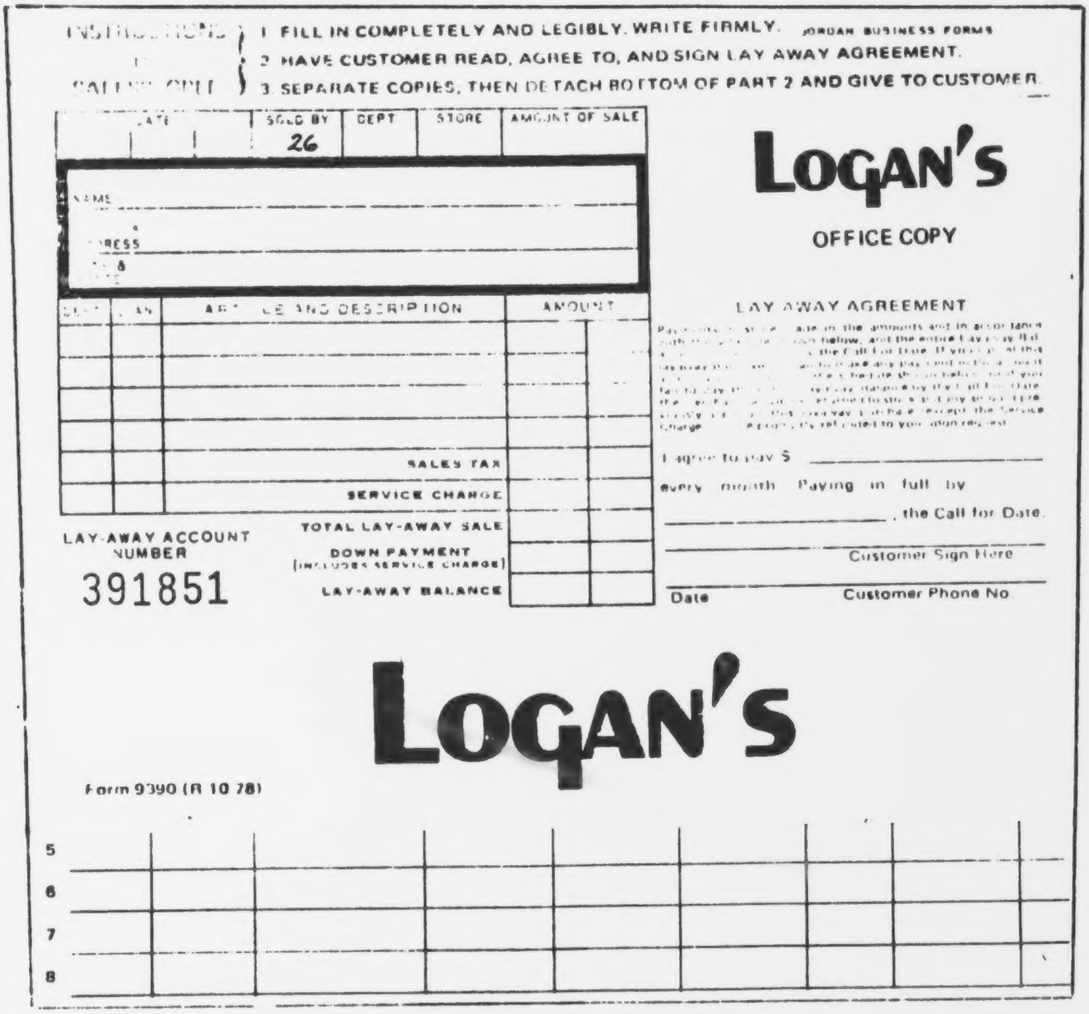
## LAYAWAY CHARGES

Directions: Compute the layaway charge and balance due on the following transaction. Record the information on the layaway sales form.

Dept. 6, Store No. 1
Customer: Ms. Terri Royal, 3204 Melrose Circle, North Wilkesboro, NC 28659

Dept. 6, 1 all-weather coat, beige, size 6 petite, $89.90

4% sales tax, $1.00 service charge, 20% deposit required



INSTRUCTIONS TO SALESPEOPLE
1 FILL IN COMPLETELY AND LEGIBLY. WRITE FIRMLY.
2 HAVE CUSTOMER READ, AGREE TO, AND SIGN LAY AWAY AGREEMENT.
3 SEPARATE COPIES, THEN DETACH BOTTOM OF PART 2 AND GIVE TO CUSTOMER.

JORDAN BUSINESS FORMS

| DATE | | | SOLD BY | DEPT | STORE | AMOUNT OF SALE |
|---|---|---|---|---|---|---|
| | | | 26 | | | |

NAME
ADDRESS
CITY & STATE

| DEPT | CLASS | ARTICLE AND DESCRIPTION | AMOUNT | |
|---|---|---|---|---|
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | SALES TAX | | |
| | | SERVICE CHARGE | | |
| | | TOTAL LAY-AWAY SALE | | |
| | | DOWN PAYMENT (INCLUDES SERVICE CHARGE) | | |
| | | LAY-AWAY BALANCE | | |

LAY-AWAY ACCOUNT NUMBER
391851

LOGAN'S

OFFICE COPY

LAY AWAY AGREEMENT

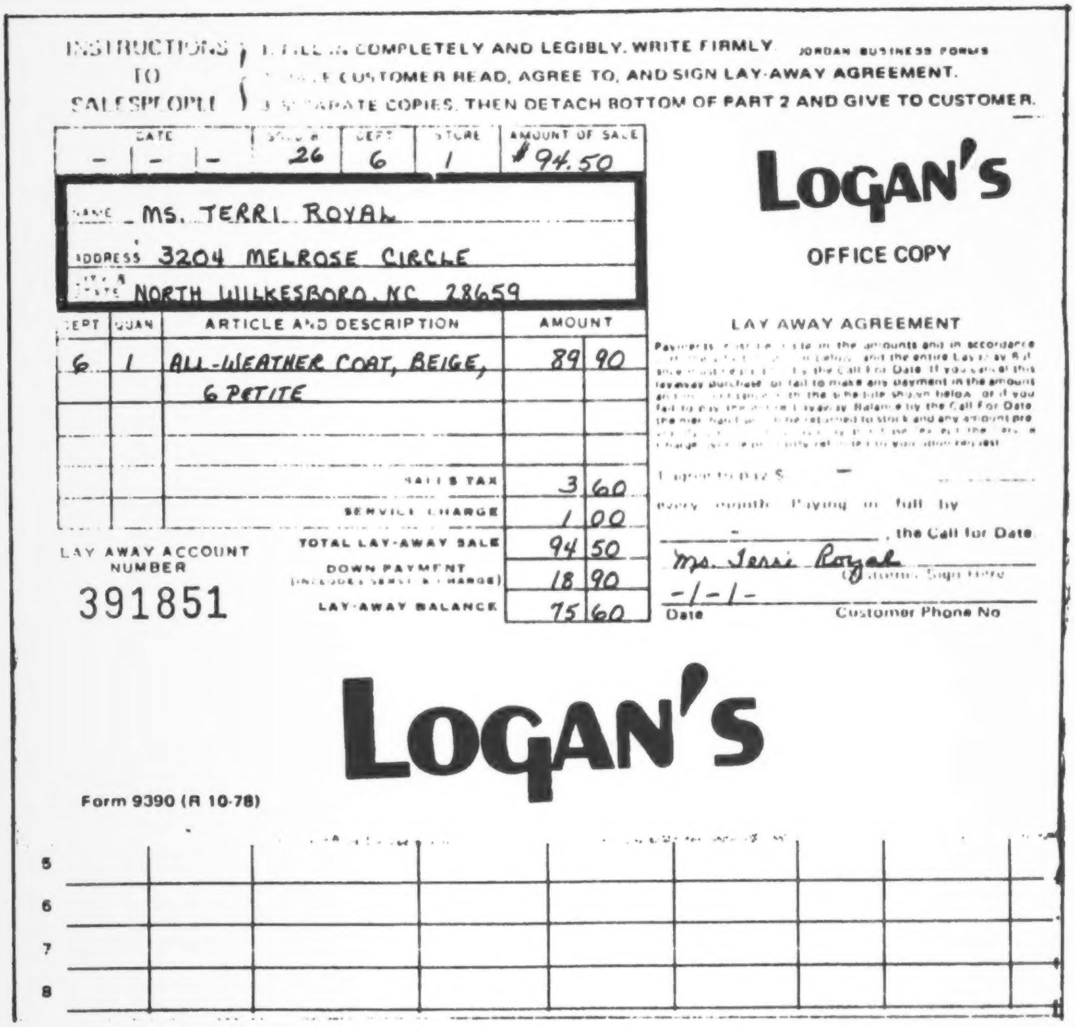
I agree to pay $ ____________
every month. Paying in full by
____________, the Call for Date.
____________ Customer Sign Here
Date ____________ Customer Phone No

LOGAN'S

Form 9390 (R 10 78)

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| 5 | | | | | | | | |
| 6 | | | | | | | | |
| 7 | | | | | | | | |
| 8 | | | | | | | | |

KEY:



INSTRUCTIONS TO SALESPEOPLE
1. FILL IN COMPLETELY AND LEGIBLY. WRITE FIRMLY.
2. HAVE CUSTOMER READ, AGREE TO, AND SIGN LAY-AWAY AGREEMENT.
3. SEPARATE COPIES. THEN DETACH BOTTOM OF PART 2 AND GIVE TO CUSTOMER.

JORDAN BUSINESS FORMS

| DATE | | | SALES # | DEPT | STORE | AMOUNT OF SALE |
|---|---|---|---|---|---|---|
| - | - | - | 26 | 6 | 1 | $94.50 |

NAME MS. TERRI ROYAL
ADDRESS 3204 MELROSE CIRCLE
CITY & STATE NORTH WILKESBORO, NC 28659

| DEPT | QUAN | ARTICLE AND DESCRIPTION | AMOUNT | |
|---|---|---|---|---|
| 6 | 1 | ALL-WEATHER COAT, BEIGE, | 89 | 90 |
| | | 6 PETITE | | |
| | | | | |
| | | | | |
| | | SALES TAX | 3 | 60 |
| | | SERVICE CHARGE | 1 | 00 |
| | | TOTAL LAY-AWAY SALE | 94 | 50 |
| | | DOWN PAYMENT (INCLUDES SERVICE CHARGE) | 18 | 90 |
| | | LAY-AWAY BALANCE | 75 | 60 |

LAY AWAY ACCOUNT NUMBER
391851

**LOGAN'S**

OFFICE COPY

LAY AWAY AGREEMENT

I agree to pay $ -
every month. Paying in full by
-, the Call for Date.
Ms. Terri Royal
Customer Sign Here
-/-/-
Date
Customer Phone No

**LOGAN'S**

Form 9390 (R 10-78)

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| 5 | | | | | | | | |
| 6 | | | | | | | | |
| 7 | | | | | | | | |
| 8 | | | | | | | | |

BEST COPY AVAILABLE

## LEGIBILITY OF SALESCHECKS

Directions: Answer the following questions about legibility of sales checks.

1. What are the three most common mistakes in writing saleschecks?
   1.
   2.
   3.
2. List three reasons legibility and accuracy are so important in writing sales checks.
   1.
   2.
   3.
3. What is the desirable form of writing which helps in eliminating confusion of letters, figures, etc.?
4. "7" could be read as the figure _____ or _____.
5. "5" could be read as the figure _____ or the letter _____.

KEY:

1. 1. Poor handwriting
   2. Poor arithmetic
   3. Omission of required information
2. (Three of these)
   1. Customers refer to sales checks.
   2. Delivery department uses them to tell what goods to ship.
   3. Credit department uses them to total amounts owed on charge accounts.
   4. Buyers use them to decide what items and quantities to order.
   5. Management uses them to determine sales volume and plan for the future.
   6. Accountants use them to keep inventory records.
3. Printing in all capitals.
4. One (1) or seven (7)
5. Figure 5 or letter S

# LAYAWAY TRANSACTIONS

Directions: To complete a layaway transaction, the salesperson must use both a sales check and a layaway ticket. Using the following salescheck and layaway ticket, record the layaway transaction given below:

On June 9, 19--, Kathy Smith of 909 Elm Street, Wilkesboro, NC 28697, phone 808-1234, puts a dress priced at $41.88 and a coat priced at $69.95 on layaway at Logan's. Clerk #15 accepts her deposit of $25.00 on the items (both from Depart. 48J) and informs the customer of the store's policy regarding layaway items; items must be paid for and picked up within a period of 90 days from date of layaway; no refunds or exchanges will be made after that time. State sales tax, 4%.

DATE: __________

NAME:

ADDRESS:

| | | | | | |
|---|---|---|---|---|---|
| **CLERK #** | **CASH** | **COD** | **CHRG.** | **DEPT.** | **J4165** |
| **Quantity** | **DESCRIPTION** | | | | **Price** |
| | | | | | |

**Instructions:**

| | |
|---|---|
| **Subtotal** | |
| **Tax** | |
| **Total** | |

KEY:

DATE: 6/9/--

NAME: KATHY SMITH

ADDRESS: 909 ELM STREET

WILKESBORO, NC 28697

| CLERK #15 | ✓ CASH | COD | CHRG. | 48J DEPT. | J4165 |
|---|---|---|---|---|---|
| Quantity | DESCRIPTION | | | | Price |
| | LAYAWAY DEPOSIT | | | | 25.00 |

Instructions:

| | |
|---|---|
| Subtotal | |
| Tax | |
| Total | 25.00 |

SA-62

| | | | |
|---|---|---|---|
| Clerk # | DATE / /<br>J9467-52-8 | | TOTAL SALE |
| DEPT. | QUANTITY | ARTICLE | PRICE |
| | | | |

| | | |
|---|---|---|
| HOLD UNTIL: | Sub-T. | |
| | SAles Tax | |
| | Total | |
| | Less Deposit | |
| | Balance | |
| | | |

NAME:

ADDRESS:

| | |
|---|---|
| Phone: | Purchaser's Signature |

| | | |
|---|---|---|
| Hold Until: / / | J9467-52-8 | Amount Due |

NAME

ADDRESS

PHONE:

| | |
|---|---|
| Attach this Stub to Merchandise | Clerk No. |
| | |

SA-62

KEY:

| | | |
|---|---|---|
| **Clerk #**<br>15 | **DATE** 6/9/--<br>**J9467-52-8** | **TOTAL SALE** |

| **DEPT.** | **QUANTITY** | **ARTICLE** | **PRICE** |
|---|---|---|---|
| 48-J | 1 | DRESS | 41.88 |
| 48-J | 1 | COAT | 69.95 |

**HOLD UNTIL:** SEPT. 9, 19-- (90 days)

| | |
|---|---|
| **Sub-T.** | 111.83 |
| **SAles Tax** | 4.47 |
| **Total** | 116.30 |
| **Less Deposit** | 25.00 |
| **Balance** | 91.30 |

**NAME:** KATHY SMITH

**ADDRESS:** 909 ELM STREET, WILKESBORO, NC 28697

**Phone:** 808-1234

**Purchaser's Signature** Kathy Smith

**Hold Until:** 9/9/--

**J9467-52-8**

**Amount Due** \# 91.30

**NAME** KATHY SMITH

**ADDRESS** 909 ELM STREET, WILKESBORO, NC 28697

**PHONE:** 808-1234

**Attach this Stub to Merchandise**

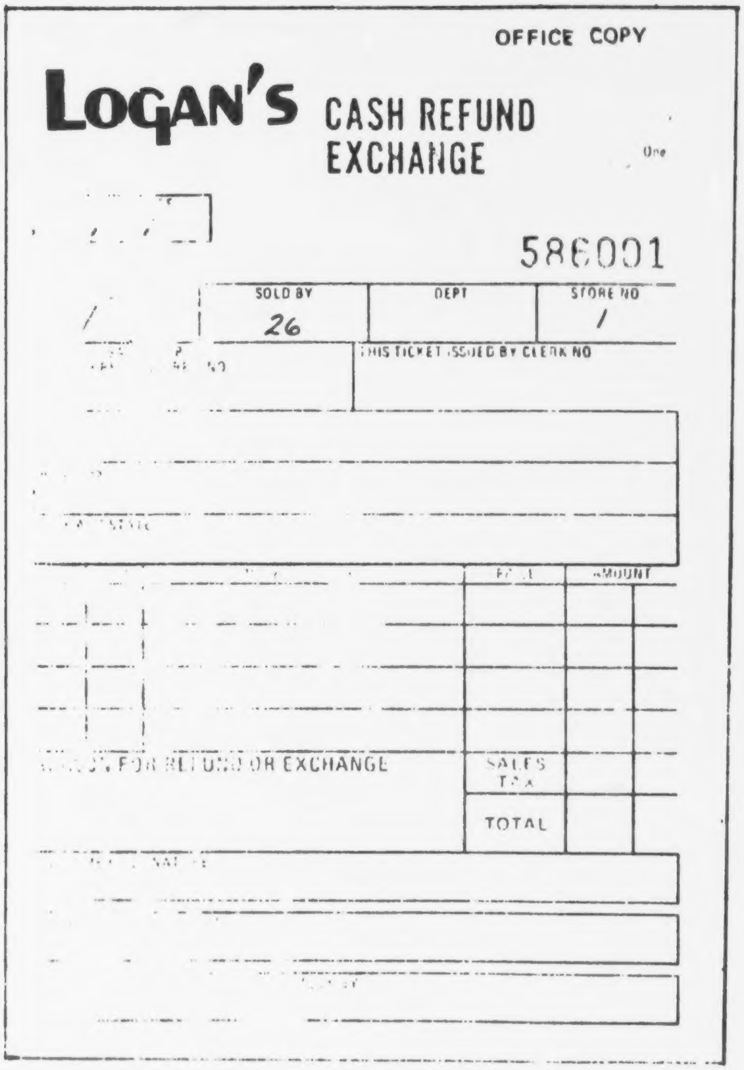
**Clerk No.** 15

SA-63

## CASH REFUND

Directions: Use Logan's special cash refund form to process the following cash refund situation.

Sammy Smith purchased a brown terry bath robe three days ago for his grandfather on approval. Sammy is returning the robe because it did not fit properly through the shoulders. The robe was a medium, and Sammy is certain that neither a small or large would be suitable. He has his sales check and the robe shows no sign of having been worn. The robe came from Dept. 5 in which you are stationed and cost $24.95 plus 4% sales tax. Sammy's address is 123 Fourth Street, Wilkesboro, NC 28697. You refund Sammy's money.



OFFICE COPY

**LOGAN'S** CASH REFUND
EXCHANGE

586001

| SOLD BY | DEPT | STORE NO |
|---|---|---|
| 26 | | 1 |

THIS TICKET ISSUED BY CLERK NO

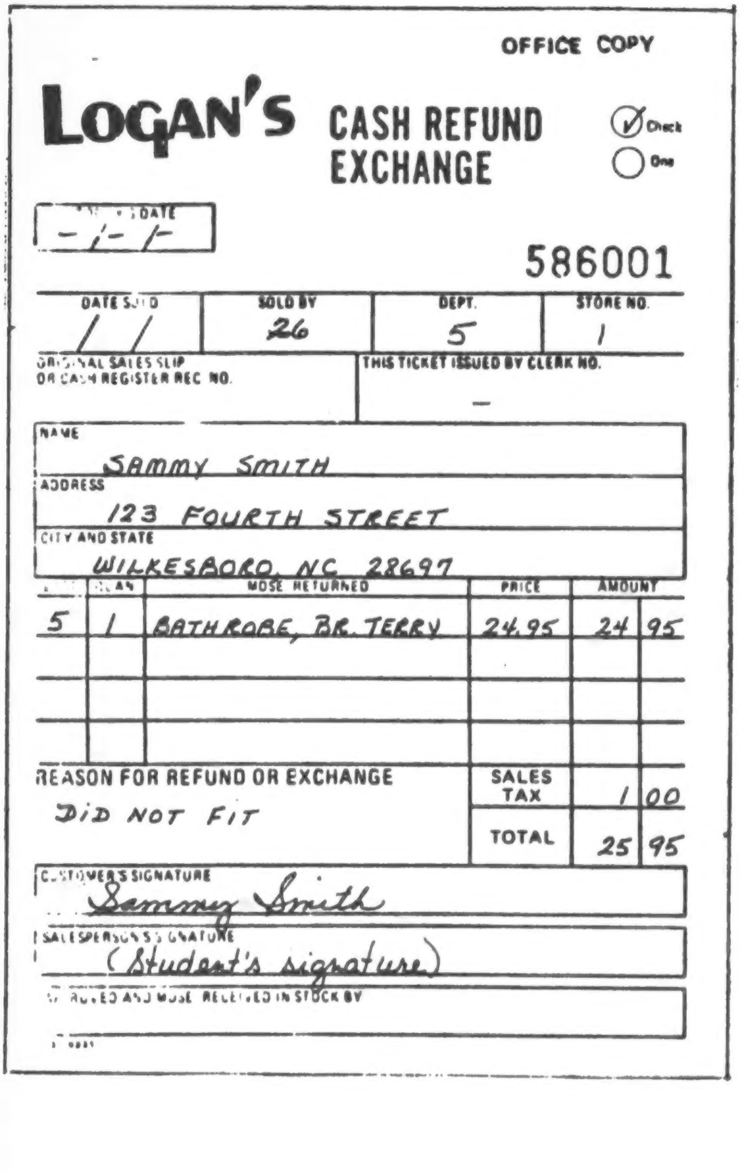
| | AMOUNT |
|---|---|
| | |
| | |
| | |
| SALES TAX | |
| TOTAL | |

REASON FOR REFUND OR EXCHANGE

BEST COPY AVAILABLE

SA-63

KEY:



OFFICE COPY

**LOGAN'S** CASH REFUND ☑ Check
EXCHANGE ○ One

DATE
-/-/-

586001

| DATE SOLD | SOLD BY | DEPT. | STORE NO. |
|---|---|---|---|
| / / | 26 | 5 | 1 |

ORIGINAL SALES SLIP OR CASH REGISTER REC NO.

THIS TICKET ISSUED BY CLERK NO. —

NAME SAMMY SMITH

ADDRESS 123 FOURTH STREET

CITY AND STATE WILKESBORO, NC 28697

| [illegible] | [illegible] | MDSE RETURNED | PRICE | AMOUNT | |
|---|---|---|---|---|---|
| 5 | 1 | BATHROBE, BR. TERRY | 24.95 | 24 | 95 |
| | | | | | |
| | | | | | |
| | | | | | |
| REASON FOR REFUND OR EXCHANGE<br>DID NOT FIT | | | SALES TAX | 1 | 00 |
| | | | TOTAL | 25 | 95 |

CUSTOMER'S SIGNATURE Sammy Smith

SALESPERSON'S SIGNATURE (Student's signature)

APPROVED AND MDSE RECEIVED IN STOCK BY

SA-64

## CHARGE CREDIT

Directions: Using Logan's special charge return form, record the following charge return.

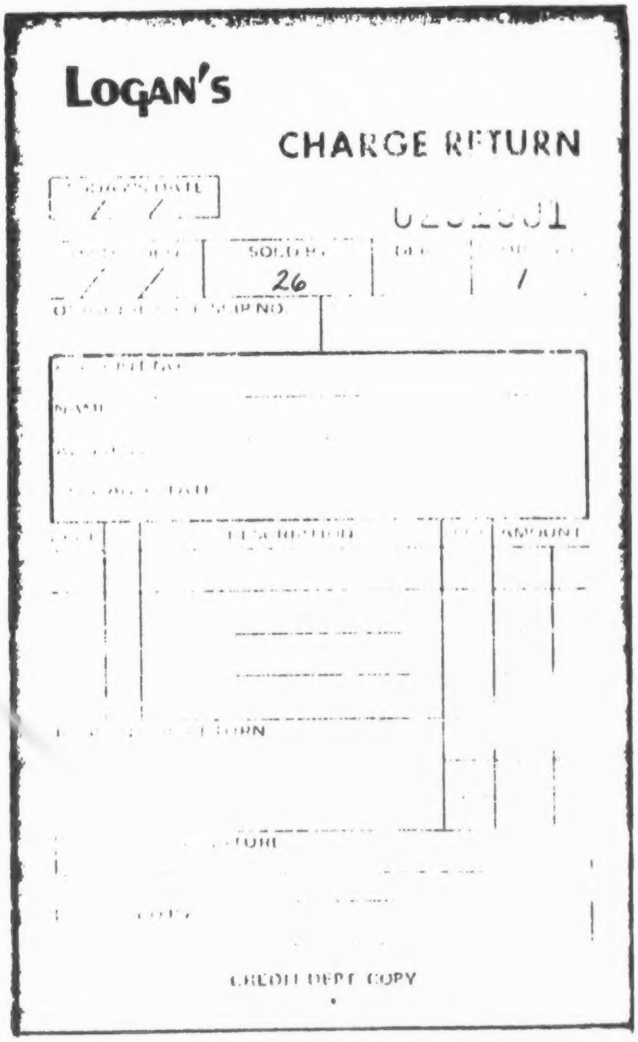
Customer: Mrs. Beth McNeil, 104 Lawndale Street, North Wilkesboro, NC 28659

Account No.: 24471 Original Sales Slip No.: 586024

Your ID No. is 26, Dept. 6, and you originally sold Mrs. McNeil the merchandise she is now returning for credit:

1 blouse, pink, size 34, Dept. 6, $28 plus 4% tax

The blouse does not match the suit she intended to wear with it.



**LOGAN'S**

CHARGE RETURN

SOLD BY 26

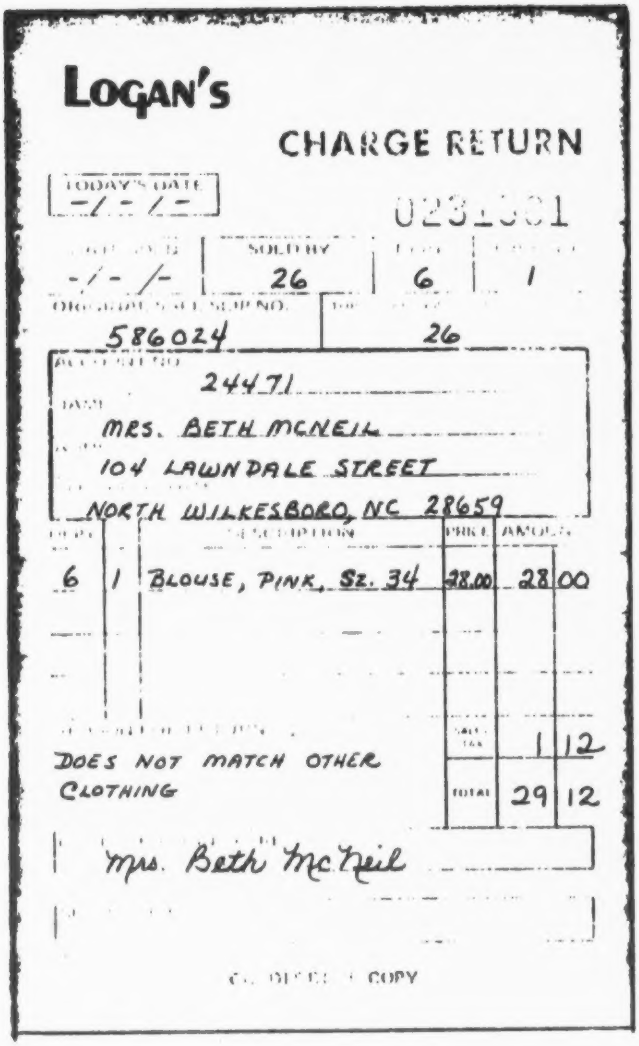
NAME

AMOUNT

CREDIT DEPT COPY

BEST COPY AVAILABLE

KEY:



**LOGAN'S**

CHARGE RETURN

TODAY'S DATE -/-/-

0231001

| | SOLD BY | | |
|---|---|---|---|
| -/-/- | 26 | 6 | 1 |

ORIGINAL SALES SLIP NO. 586024 26

24471

MRS. BETH MCNEIL
104 LAWNDALE STREET
NORTH WILKESBORO, NC 28659

| | | DESCRIPTION | PRICE | AMOUNT | |
|---|---|---|---|---|---|
| 6 | 1 | BLOUSE, PINK, Sz. 34 | 28.00 | 28 | 00 |
| | | | SALES TAX | 1 | 12 |
| | | | TOTAL | 29 | 12 |

DOES NOT MATCH OTHER CLOTHING

Mrs. Beth McNeil

COPY

272

BEST COPY AVAILABLE

SA-66

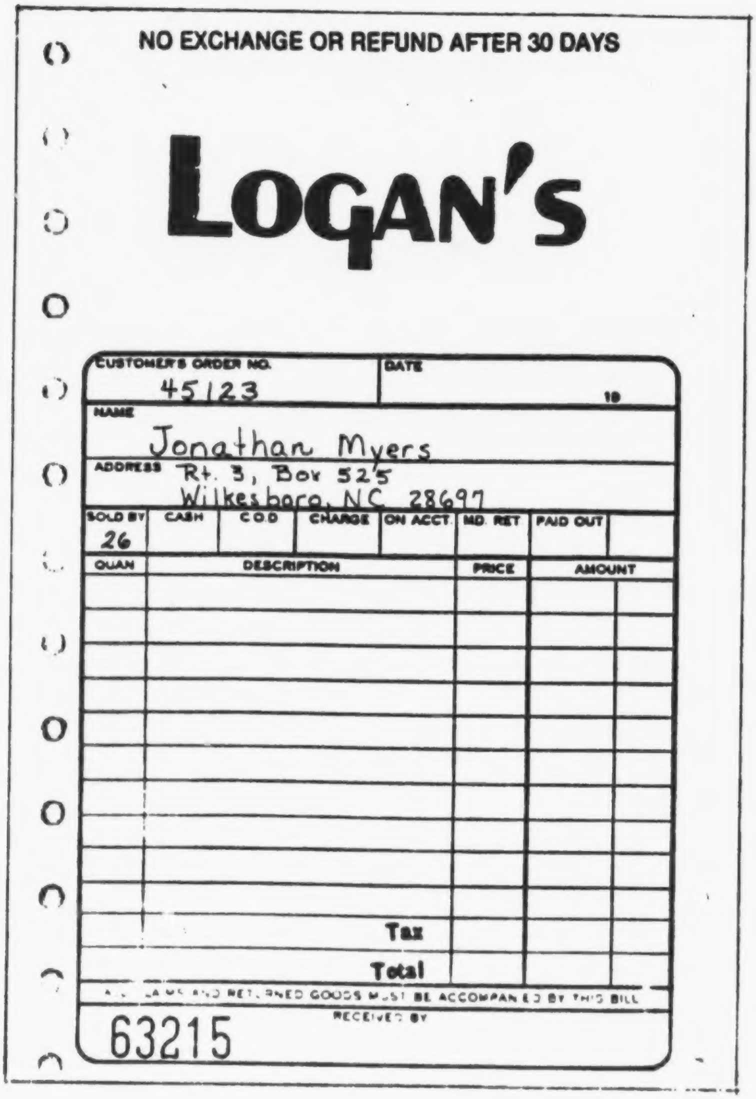
## EXCHANGES

Directions: Complete the following salescheck for the items being exchanged as described below:

Item returned:
1 suit, size 40 reg., $109.95

New item:
1 suit, size 40 reg., $119.95

Sales tax rate 4%



**NO EXCHANGE OR REFUND AFTER 30 DAYS**

**LOGAN'S**

| | |
|---|---|
| CUSTOMER'S ORDER NO.<br>45123 | DATE<br>19 |
| NAME<br>Jonathan Myers | |
| ADDRESS Rt. 3, Box 525<br>Wilkesboro, NC 28697 | |

| SOLD BY | CASH | C.O.D. | CHARGE | ON ACCT. | MD. RET. | PAID OUT | |
|---|---|---|---|---|---|---|---|
| 26 | | | | | | | |

| QUAN | DESCRIPTION | PRICE | AMOUNT | |
|---|---|---|---|---|
| | | | | |
| | | | | |
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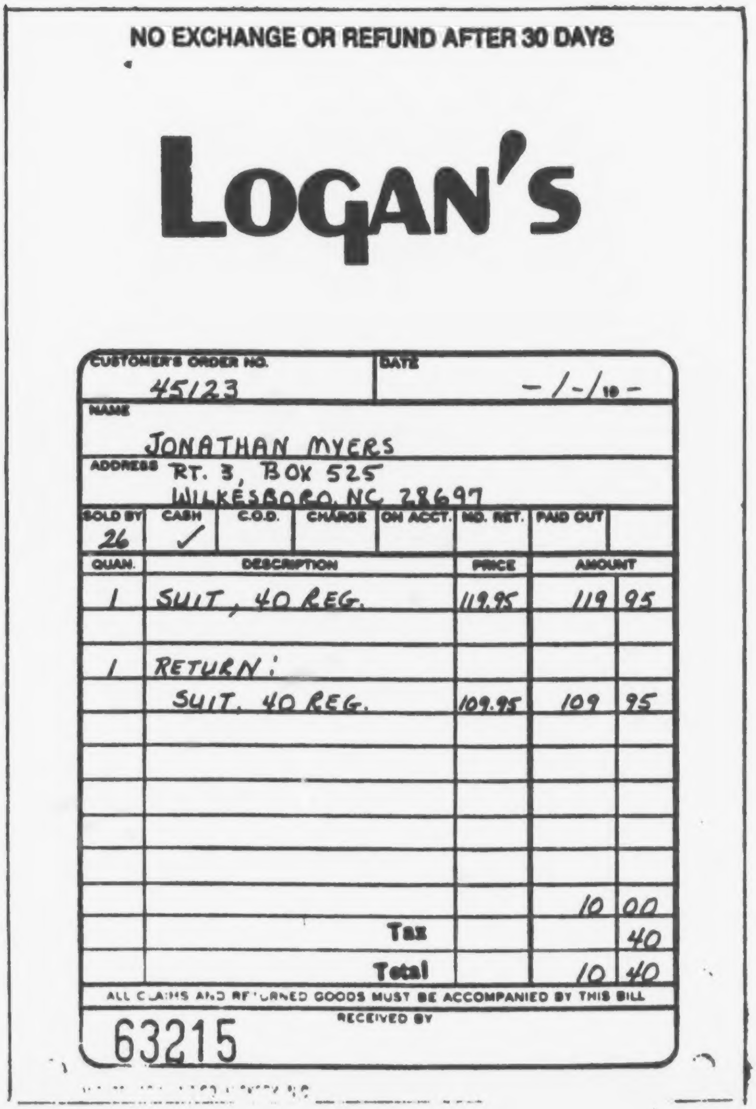
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | Tax | | | |
| | Total | | | |

ALL CLAIMS AND RETURNED GOODS MUST BE ACCOMPANIED BY THIS BILL

63215

RECEIVED BY

KEY:



**NO EXCHANGE OR REFUND AFTER 30 DAYS**

**LOGAN'S**

CUSTOMER'S ORDER NO. 45123

DATE -/-/10-

NAME JONATHAN MYERS

ADDRESS RT. 3, BOX 525
WILKESBORO, NC 28697

| SOLD BY | CASH | C.O.D. | CHARGE | ON ACCT. | MD. RET. | PAID OUT | |
|---|---|---|---|---|---|---|---|
| 26 | ✓ | | | | | | |

| QUAN. | DESCRIPTION | PRICE | AMOUNT | |
|---|---|---|---|---|
| 1 | SUIT, 40 REG. | 119.95 | 119 | 95 |
| | | | | |
| 1 | RETURN: | | | |
| | SUIT, 40 REG. | 109.95 | 109 | 95 |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | 10 | 00 |
| | Tax | | | 40 |
| | Total | | 10 | 40 |

ALL CLAIMS AND RETURNED GOODS MUST BE ACCOMPANIED BY THIS BILL

RECEIVED BY

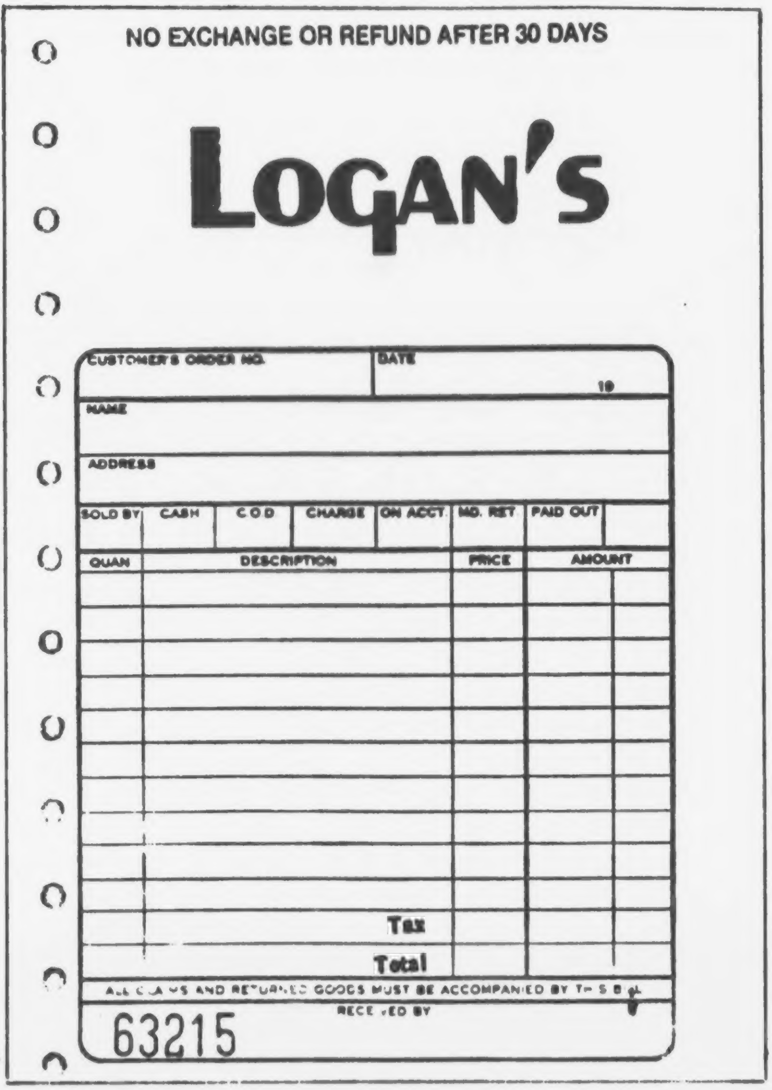
63215

SA-68

## GIFT CERTIFICATES

Directions: Using the following forms, write a sales check and gift certificate for this sales situation.

Allen Shumate, treasurer of Blue Ridge DECA Chapter, has been asked by the members to purchase a $20 gift certificate for their advisor, Jane Brown for Christmas. Ms. Brown's address if Route 3, Box 525, Wilkesboro, NC 28697. Blue Ridge DECA is located in Wilkesboro also.



NO EXCHANGE OR REFUND AFTER 30 DAYS

**LOGAN'S**

CUSTOMER'S ORDER NO.

DATE 19

NAME

ADDRESS

| SOLD BY | CASH | C O D | CHARGE | ON ACCT. | MD. RET. | PAID OUT |  |
|---|---|---|---|---|---|---|---|
|  |  |  |  |  |  |  |  |

| QUAN | DESCRIPTION | PRICE | AMOUNT |
|---|---|---|---|
|  |  |  |  |
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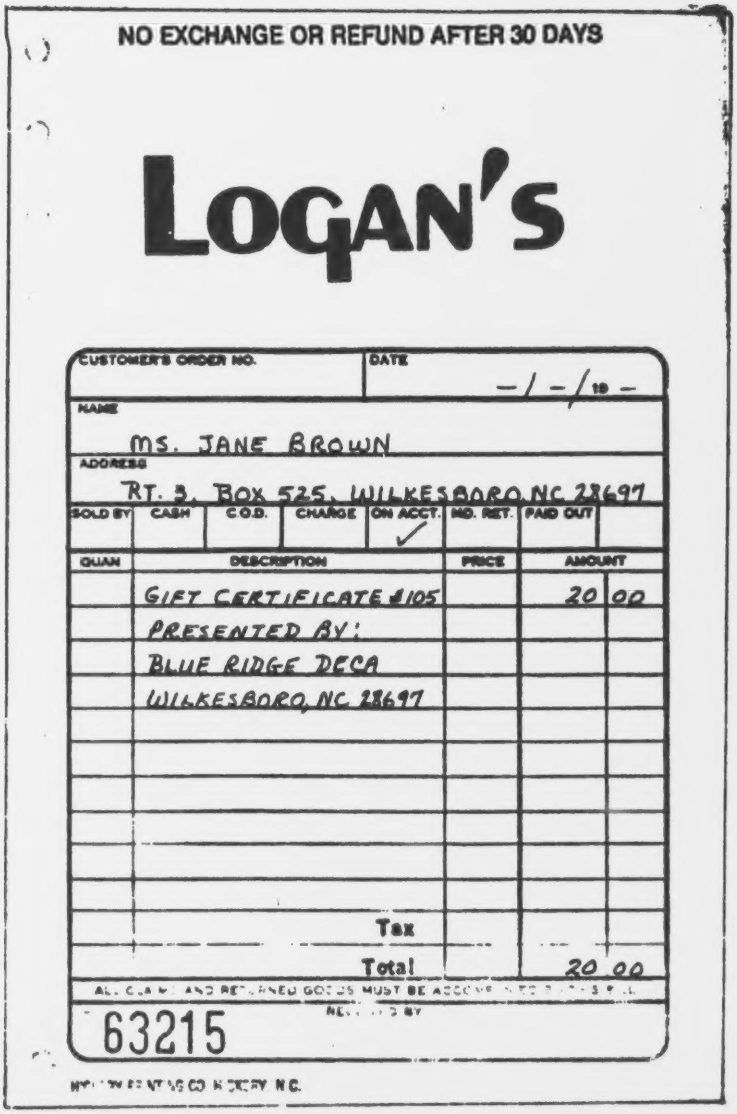
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  | Tax |  |  |
|  | Total |  |  |

ALL CLAIMS AND RETURNED GOODS MUST BE ACCOMPANIED BY THIS BILL

63215

RECEIVED BY

KEY:



**NO EXCHANGE OR REFUND AFTER 30 DAYS**

**LOGAN'S**

CUSTOMER'S ORDER NO.

DATE —/—/19—

NAME MS. JANE BROWN

ADDRESS RT. 3, BOX 525, WILKESBORO, NC 28697

| SOLD BY | CASH | C.O.D. | CHARGE | ON ACCT. | MD. RET. | PAID OUT | |
|---|---|---|---|---|---|---|---|
| | | | | ✓ | | | |

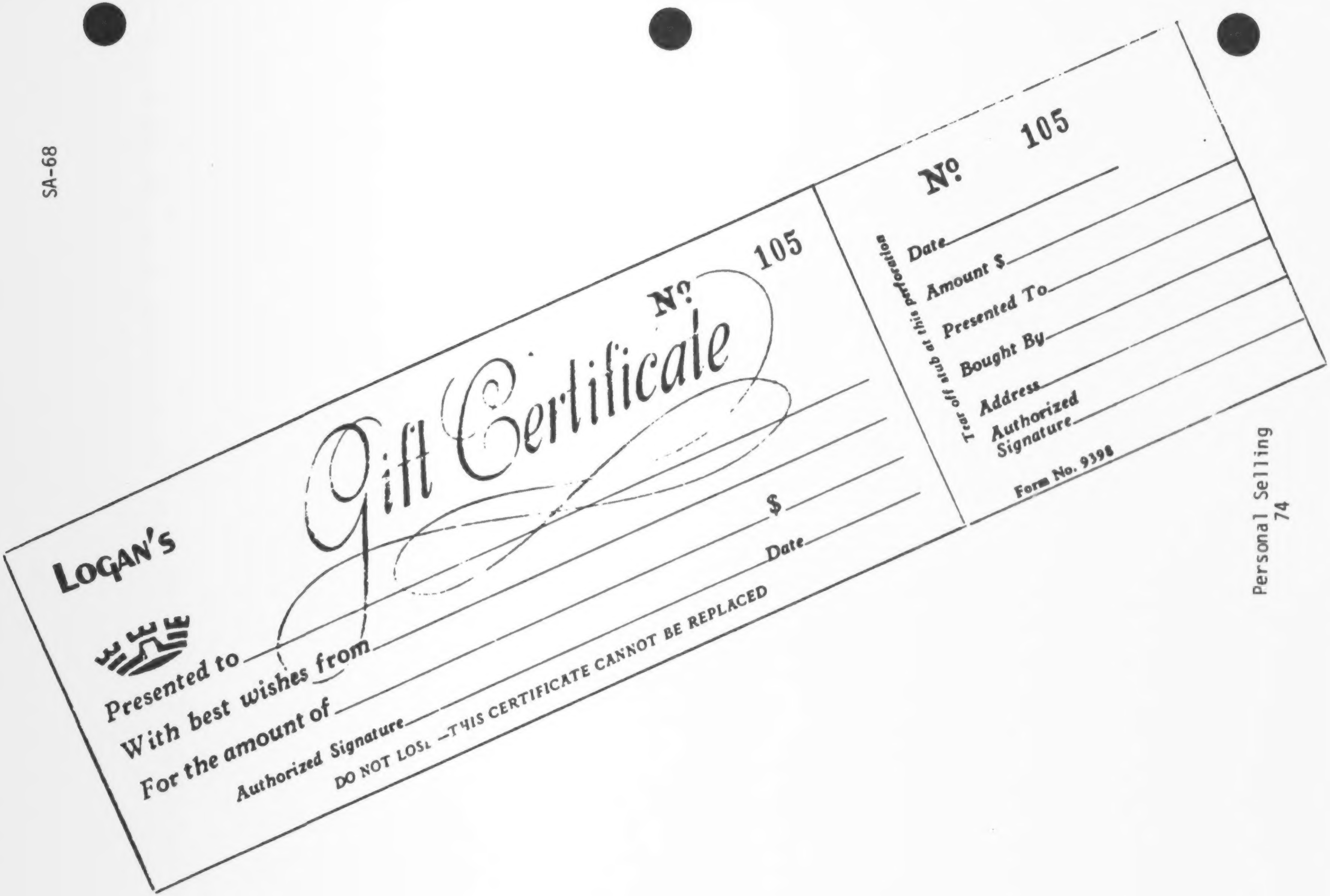
| QUAN | DESCRIPTION | PRICE | AMOUNT | |
|---|---|---|---|---|
| | GIFT CERTIFICATE $105 | | 20 | 00 |
| | PRESENTED BY: | | | |
| | BLUE RIDGE DECA | | | |
| | WILKESBORO, NC 28697 | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | Tax | | | |
| | Total | | 20 | 00 |

ALL CLAIMS AND RETURNED GOODS MUST BE ACCOMPANIED BY THIS BILL

63215 RECEIVED BY

[illegible] HICKORY N.C.

SA-68



**LOGAN'S**

# Gift Certificate

No. 105

Presented to

With best wishes from

For the amount of

$

Date

Authorized Signature

DO NOT LOSE —THIS CERTIFICATE CANNOT BE REPLACED

Tear off stub at this perforation

No. 105

Date

Amount $

Presented To

Bought By

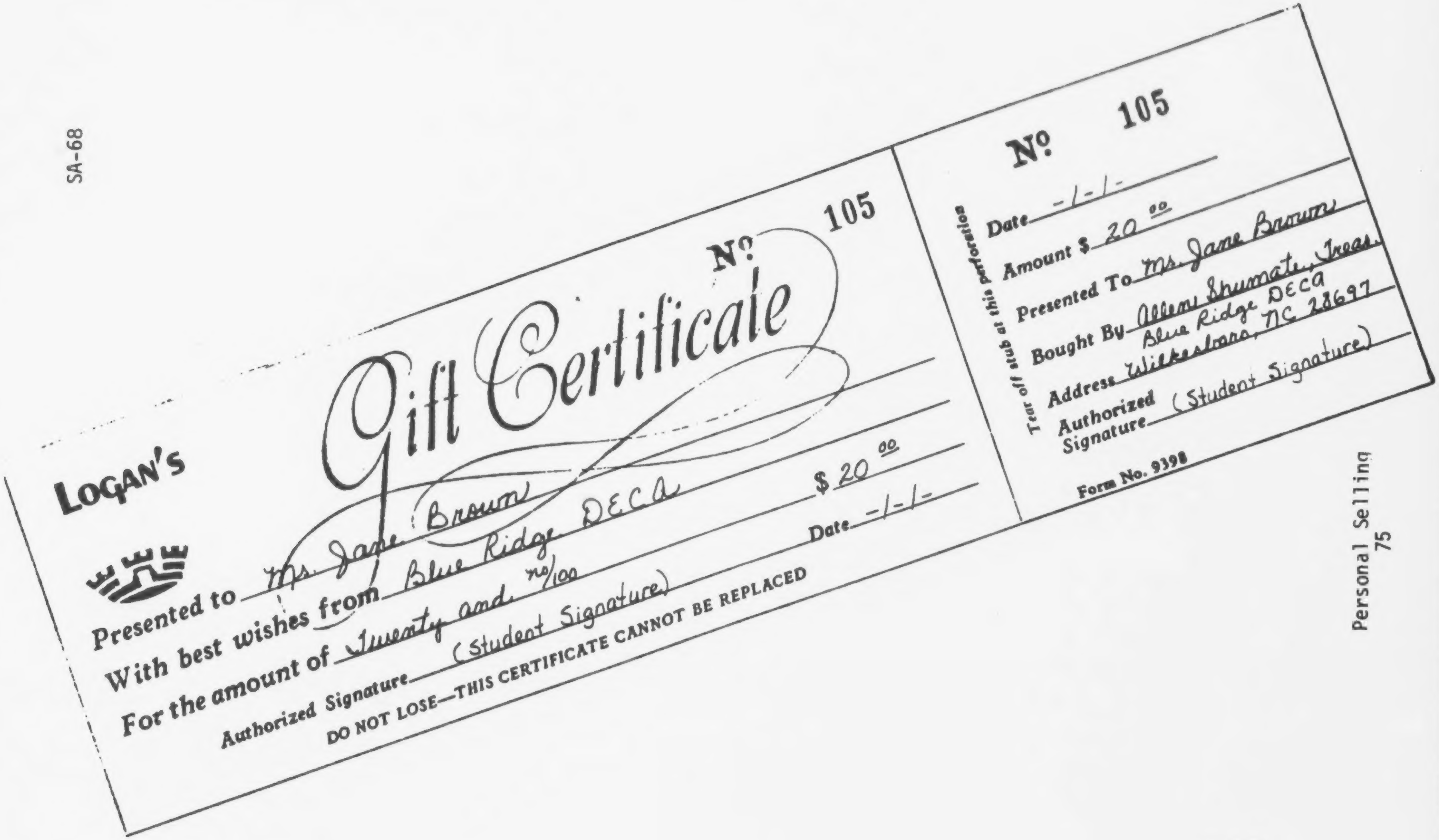
Address

Authorized Signature

Form No. 9398

Personal Selling
74

SA-68



**LOGAN'S**

Gift Certificate

No 105

Presented to Ms. Jane Brown

With best wishes from Blue Ridge DECA

For the amount of Twenty and no/100

$ 20 00

Authorized Signature (Student Signature)

Date -1-1-

DO NOT LOSE—THIS CERTIFICATE CANNOT BE REPLACED

Tear off stub at this perforation

No 105

Date -1-1-

Amount $ 20 00

Presented To Ms. Jane Brown

Bought By Allen Shumate, Treas.

Address Blue Ridge DECA
Wilkesboro, NC 28697

Authorized Signature (Student Signature)

Form No. 9398

Personal Selling
75

KEY:

# HANDLING SPECIAL ORDERS

Directions: Using the following information, fill in the want slip and special order request forms.

WANT SLIP:

Assume that you are a salesperson in the men's department of Logan's. The want slip is to be handwritten in ink. A customer asks you for an automatic push-button Tote's umbrella. Logan's does not carry the automatic umbrellas. He wants it in dark brown, standard size, and will not accept a substitute. The price is $25.00. He asks you to order the umbrella for him.

1. Use today's date.
2. Dept. 1490, Employee No. 200.
3. Leave.

SPECIAL ORDER REQUEST:

Assume that you are a salesperson in the men's department of Logan's. Your customer wants you to order the umbrella described in the Want Slip section of this activity.

1. Use today's date.
2. Department No. 1490
3. Employee No. 200
4. Customer's name, address, and phone: Mr. Jack L. Johnson, 574 East Street, Lenoir, NC 28645, (704) 845-3003
5. Style No. 456
6. Color: Dark Brown
7. Size: Std.
8. Price: $25.00
9. Sales tax rate: 4%

# WANT SLIP

Date______________

Dept. No.__________

Employee No.________

Keep this slip in your salesbook. Whenever an item is called for that is not in stock, whether carried regularly or not, record that fact at once. Make certain that you record every call. If the customer requested a special order, fill out the "Special Order Request".

| ITEM CALLED FOR | WANTED |  |  |  | Order Taken | Subst. Sold | Sale Lost | Buyer's Disposition |
|---|---|---|---|---|---|---|---|---|
|  | style | color | size | price |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |

TO THE SALESPERSON: Write plainly, put one copy in the index and give one copy to your Department Manager.

# WANT SLIP

Date -/-/-

Dept. No. 1490

Employee No. 200

Keep this slip in your salesbook. Whenever an item is called for that is not in stock, whether carried regularly or not, record that fact at once. Make certain that you record every call. If the customer requested a special order, fill out the "Special Order Request".

| ITEM CALLED FOR | WANTED |  |  |  | Order Taken | Subst. Sold | Sale Lost | Buyer's Disposition |
|---|---|---|---|---|---|---|---|---|
|  | style | color | size | price |  |  |  |  |
| TOTE'S UMBRELLA | Auto. | DK. Brown | Std. | $25.00 | ✓ |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |

TO THE SALESPERSON: Write plainly, put one copy in the index and give one copy to your Department Manager.

Date__________

# Special Order Request

Dept. No.________

Employee No.______

Your Customer will be notified by phone for a confirmation or cancellation of this order.

Customer's Name______________________________

Customer's Address______________________________

Customer's Phone____________________

| ITEM | QUANTITY | STYLE | COLOR | SIZE | PRICE | | |
|---|---|---|---|---|---|---|---|
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |

For Buyer's Use Only

| | | | |
|---|---|---|---|
| Sub-Total | | | |
| tax | | | |
| Total | | | |

Date Ordered____________________

Delivery Date____________________

Customer Called____________________

____________________

Customer's Signature

Date -1-1-

# Special Order Request

Dept. No. 1490
Employee No. 200

Your Customer will be notified by phone for a confirmation or cancellation of this order.

Customer's Name JACK L. JOHNSON

Customer's Address 574 EAST STREET, LENOIR, NC 28645

Customer's Phone 704- 845- 3003

| ITEM | QUANTITY | STYLE | COLOR | SIZE | PRICE | |
|---|---|---|---|---|---|---|
| TOTE'S UMBRELLA, AUTOMATIC PUSH-BUTTON | 1 | 456 | DK. BROWN | STD. | 25 | 00 |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

For Buyer's Use Only

| | | |
|---|---|---|
| Sub-Total | 25 | 00 |
| tax | 1 | 00 |
| Total | 26 | 00 |

Date Ordered

Delivery Date

Customer Called

Jack L. Johnson
Customer's Signature

SA-70

# TELEPHONE SELLING

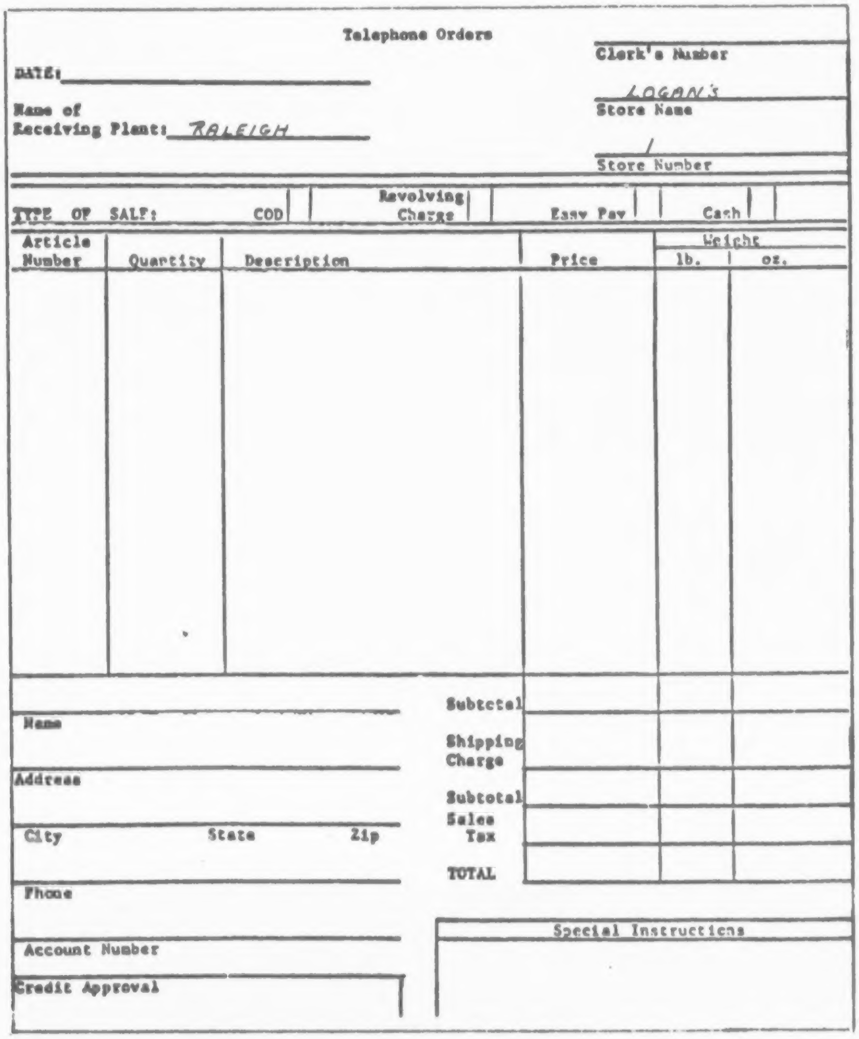
Directions: Using the following case problem, fill in the telephone order form.

Mrs. Robert Johnson, 314 Elm Street, Boone, NC 28607, phoned from 264-3434 the following order:

Article #1: 1 dress, order no. 240700F, size 8, $27.98, shipping weight 1 lb, 2 oz.

Article #2: 1 sweater, order no. 2408976F, size 36, $15.99, shipping weight 1 lb. 6 oz.

This will be a COD order. Clerk No. 754. Total shipping charges are $1.65 and sales tax is 4%.



**Telephone Orders**

DATE: ____________

Name of Receiving Plant: RALEIGH

Clerk's Number ____________

LOGAN'S
Store Name

1
Store Number

TYPE OF SALE: COD ☐ Revolving Charge ☐ Easy Pay ☐ Cash ☐

| Article Number | Quantity | Description | Price | Weight lb. | Weight oz. |
|---|---|---|---|---|---|
| | | | | | |
| | | Subtotal | | | |
| | | Shipping Charge | | | |
| | | Subtotal | | | |
| | | Sales Tax | | | |
| | | TOTAL | | | |

Name

Address

City State Zip

Phone

Account Number

Credit Approval

Special Instructions

KEY:

**Telephone Orders**

754
**Clerk's Number**

**DATE:** -1-1-

LOGAN'S
**Store Name**

**Name of Receiving Plant:** RALEIGH

1
**Store Number**

| | | | | |
|---|---|---|---|---|
| **TYPE OF SALE:** | COD ✓ | **Revolving Charge** | Easy Pay | Cash |

| Article Number | Quantity | Description | Price | Weight lb. | Weight oz. |
|---|---|---|---|---|---|
| 240700F | 1 | Dress, size 8 | 27.98 | 1 | 2 |
| 2408976F | 1 | Sweater, size 36 | 15.99 | 1 | 6 |

MRS. ROBERT JOHNSON
**Name**

314 ELM STREET
**Address**

BOONE NC 28607
**City** **State** **Zip**

264-3434
**Phone**

Account Number

| | | | |
|---|---|---|---|
| **Subtotal** | 43.97 | 2 | 8 |
| **Shipping Charge** | 1.65 | | |
| **Subtotal** | 45.62 | | |
| **Sales Tax** | 1.76 | | |
| **TOTAL** | 47.38 | | |

Credit Approval

Special Instructions

## SELF-SERVICE SELLING

Directions: Answer the following questions about self-service selling.

1. Since, salespeople do not greet all customers in a self-service situation, how is the customer's attention attracted to merchandise?

2. List at least three duties (in addition to selling duties) performed by self-service personnel.

3. List at least three selling duties of self-service personnel.

4. Why should the salesperson direct the customer to the merchandise rather than leading him/her?

5. Why should the salesperson direct the customer to the checkout counter rather than leading him/her?

KEY:

1. Through the use of display materials such as signs, labels, and tags.
2. (Three of these)
    1. Stocking
    2. Operating cash register
    3. Wrapping
    4. Marking
    5. Inventorying
    6. Displaying
    7. Housekeeping
    4. Watching for shoplifters
3. (Three of these)
    1. Recording selected merchandise on a form to present at checkout
    2. Explaining merchandise
    3. Answering customer questions
    4. Directing customers to merchandise
    5. Giving advice
    6. Convincing customers to buy
    7. Making sales presentations
4. Leading the customer may cause him/her to depend on the salesperson and interfere with the customer selection of the merchandise.
5. Leading the customer would probably stop the customer from buying other items encountered on the way to the checkout or in other departments.

## Unit IV - Personal Selling

HO-1 The Greatest Profession in the World - Selling LAP 3, #938, HO-5.
HO-2 Salespersons Build America - Selling LAP 2, #923A, HO-1.
HO-3 Personality Traits Valuable to Selespersons - Selling LAP 3, #938, HO-1.
HO-4 What Is Selling - Selling LAP 3, #938, HO-3.
HO-5 Basic Customer Needs - Selling LAP 40, #830A, HO-1.
HO-6 Types of Customers
HO-7 How to Listen and Talk to Customers
HO-8 Hints for Better Questions - Selling LAP 51, #884B, HO-5.
HO-9 Key Words for Questions
HO-10 Size Variations Depending Upon the Manufacturer and Price Lines - Product and Service Technology LAP 36, #500, HO-1.
HO-11 Substitute Selling - Selling LAP 59, #809, Form #2.
HO-12 Objections - Selling LAP 49, #874C, HO-1.
HO-13 Getting Together - Selling LAP 49, #874C, HO-4.
HO-14 Handling Objections - Selling LAP 49, #874C, HO-5.
HO-15 Types of Difficult Customers - Selling LAP 43, #897A, HO-1.
HO-16 Ability to Tactfully Handle Difficult Customers - Selling LAP 43, #897B, HO-4.
HO-17 Closing the Sale - Selling LAP 52, #820B, HO-7.
HO-18 Suggestive Selling - Selling LAP 59, #809, Form 1.
HO-19 The Importance of Suggestion Selling - Selling LAP 56, #929A, Form 1.
HO-20 Remembering Names - Selling LAP 32, #862, Form 1.
HO-21 Charge Transactions - Selling LAP 16, #814, HO-2.
HO-22 Handling Refunds and Exchanges - Selling LAP 19, #879A, HO-1.
HO-23 Communications in Telephone Selling - Communications LAP 8, #099, HO-1.
HO-24 Presenting Merchandise in Telephone Selling - Communications LAP 8, #156, HO-1.

TM-1 Rational and Emotional Motives
TM-2 Know Your Customer
TM-3 Study the Customer
TM-4 First Ten Seconds of a Sale - Selling LAP 31, #869
TM-5 Purpose of the Approach - Selling LAP 31, #869
TM-6 Features of the Approach - Selling LAP 31, #869
TM-7 Ten Listening Techniques
TM-8 Customer Participation
TM-9 Difficult Customers
TM-10 Ways to Handle Difficult Customers
TM-11 General Principles to Observe in Closing Sales
TM-12 Buying Signals - Examples
TM-13 When to Execute the Close
TM-14 Suggestion Service Selling
TM-15 Sample Charge Sales Forms* - Retail Sales Transactions, TM-9, d.m. 9A
TM-16 General Sales Form* - Retail Sales Transactions, TM-2, d.m. 2A & 2B
TM-17 Tax Schedule to a $1.00* - Obtain a tax chart from N.C. Department of Revenue
TM-18 Tax Chart*
TM-19 Sample Layaway Sales Forms* - Retail Sales Transactions, TM-5, d.m. 5A
TM-20 Sample Layaway Sales Form and Ticket*

TM-21 Sample Specially Designed Layaway Sales Form*
TM-22 Sample Layaway Account Form*
TM-23 Layaway Payment*
TM-24 Cash Refunds* - Retail Sales Transactions, TM-10, d.m. 10A
TM-25 Credit Refunds* - Retail Sales Transactions, TM-11, d.m. 11A
TM-26 Even Exchange*
TM-27 Uneven Exchange*
TM-28 Uneven Exchange* - Method #2
TM-29 Uneven Exchange* - Method #2
TM-30 Sample Gift Certificate Sales Form*
TM-31 Sample Gift Certificate*
TM-32 Sample Want Slip*
TM-33 Sample Special Order Request*
TM-34 Communications in Telephone Selling* - Communications LAP 8, #156, HO-4

*Copies of these forms are found in your Fashion Merchandising Curriculum Guide or you may obtain copies from local stores.

## TYPES OF CUSTOMERS

Professional salespeople need knowledge of the major types of customers, how to recognize them, and how to handle them. All customers are different and should be treated as individuals. The following list can serve as a general guideline to customer types.

| TYPE CUSTOMER | HOW TO RECOGNIZE | HOW TO HANDLE |
|---|---|---|
| TALKATIVE customer | a. Apt to discuss personal matters<br>b. Friendly, jovial<br>c. Likes to talk and gossip<br>d. Will hold up other customers | a. Don't get impatient<br>b. Don't gossip. Bring back to merchandise.<br>c. Listen. Don't become personal. |
| SILENT customer | a. Not enthusiastic<br>b. Talks very little<br>c. Not positive in nature | a. Be patient<br>b. Ask questions with a "yes" or "no" answer<br>c. Demonstrate merchandise<br>d. Give selling points slowly<br>e. Don't talk too much<br>f. Watch his/her actions |
| LOOKER customer | a. Often moves away when approached<br>b. May buy on impulse<br>c. Says he/she is "just looking"<br>d. Moves slowly and fingers merchandise | a. Use merchandise approach, if possible<br>b. Invite back to store even if didn't buy<br>c. Be pleasant and welcome to department<br>c. Don't pressure |
| HURRIED customer | a. Demands attention quickly<br>b. Often talks fast and loud<br>c. Quick and abrupt<br>d. Nervous actions | a. Be alert - act quickly<br>b. Use caution in suggesting substitutes<br>c. Cover steps of sale as quickly as possible<br>d. Serve promptly<br>e. Sympathize with his/her problems |

HO-6
Cont'd.

| TYPE OF CUSTOMER | HOW TO RECOGNIZE | HOW TO HANDLE |
|---|---|---|
| DECIDED customer | a. Direct in manner<br>b. Asks for specific<br>c. Knows what he/she wants<br>d. Businesslike in manner | a. Let him/her do the talking<br>b. Use caution in suggesting substitutes<br>c. Show merchandise quickly<br>d. Give selling points in direct, businesslike manner |
| UNDECIDED customer | a. Doesn't know merchandise<br>b. Often will go home to think about it<br>c. Will check with wife or husband<br>d. Continually changes mind<br>e. Afraid of not getting money's worth | a. Look for signs of interest<br>b. Be firm and convincing<br>c. Show variety of merchandise, one at a time<br>d. Help him/her to decide<br>e. Stress economy and quality |

# HOW TO LISTEN AND TALK TO CUSTOMERS

The stakes are more sales, more customers sold the first time; fewer callbacks, fewer lost sales when you:

1. Try to understand the words you hear the way they are intended to be understood.

2. Recognize the variety of tasks that certain words must perform. "Cat" means "lion" to a big-game hunter, "kitten" to a child, "weapon of punishment" for a user of whips. Find out what the customer means.

3. Reach for a clearer understanding of what is being said by looking at words, thoughts, objections from the customer's point of view.

4. Make it a habit to restate accurately in your own mind, or repeat if necessary in your own words, the ideas and feelings of the customer speaking.

5. Try to avoid misunderstanding by being specific, by spelling out what you mean in concrete terms. Stay away from words that are vague in meaning and subject to broad interpretation.

6. Look at the context of what the customer is saying - the background of the discussion; unexpressed but obvious thoughts and feelings. Search for the meaning of his/her words and what's behind them.

7. Remember how the customer says things because how he/she says them frequently tells more than what he/she says.

8. Occasionally talk just for the sake of talking - to keep communication channels open, maintain rapport, establish areas of agreement.

9. Consider the customer's actions - they often impart a meaning far beyond what his/her words spell out. The feeling in his/her voice, facial expressions, the use he/she makes of his/her hands speaks louder than words at times.

10. Strive to determine the factors on which the information you are receiving is based - experience, direct observation, somebody else's opinions.

11. Look for the assumptions in the customer's talk. Recognizing them will help you see the facts more clearly. Does what he/she says indicate he/she assumes the price is out of line? Spot this sales obstacle early and the selling job is easier.

12. Watch for opinions. Although there's nothing wrong with customers having them, they complicate your listening and foul up your sales presentation if you accept them as facts.

13. Listen past the no's, the turndowns, the stalls - for their real meaning and the true feeling behind the words.
14. Lastly, encourage the buyer to talk. Few lasting sales relations ever take place where the customer isn't given the opportunity to say his piece.

## KEY WORDS FOR QUESTIONS

CLASSIFY--Demands the assembling, arranging, distributing, and grouping of facts according to some common characteristics.

COMPARE--Requires the detection of resemblance and difference among facts.

CRITICIZE--Exacts good judgement, and a careful analysis of a subject.

DEFINE--Necessitates the determination of boundaries or limits to a subject and fixing of a clear meaning.

DESCRIBE--Calls for the selection and portrayal of the features of qualities which characterize a subject.

DISCUSS--Compels a minute examination of a subject presenting pro and con considerations and arguments in supporting a position.

EXPLAIN--Makes necessary a clarification of any points which may obscure a subject.

ILLUSTRATE--Calls for examples that will explain or clear up the subject under consideration.

INTERPRET--Necessitates bringing out the meaning of a subject in the light of an individual's belief or judgement.

JUSTIFY--Demands showing that a thing is reasonable or warranted.

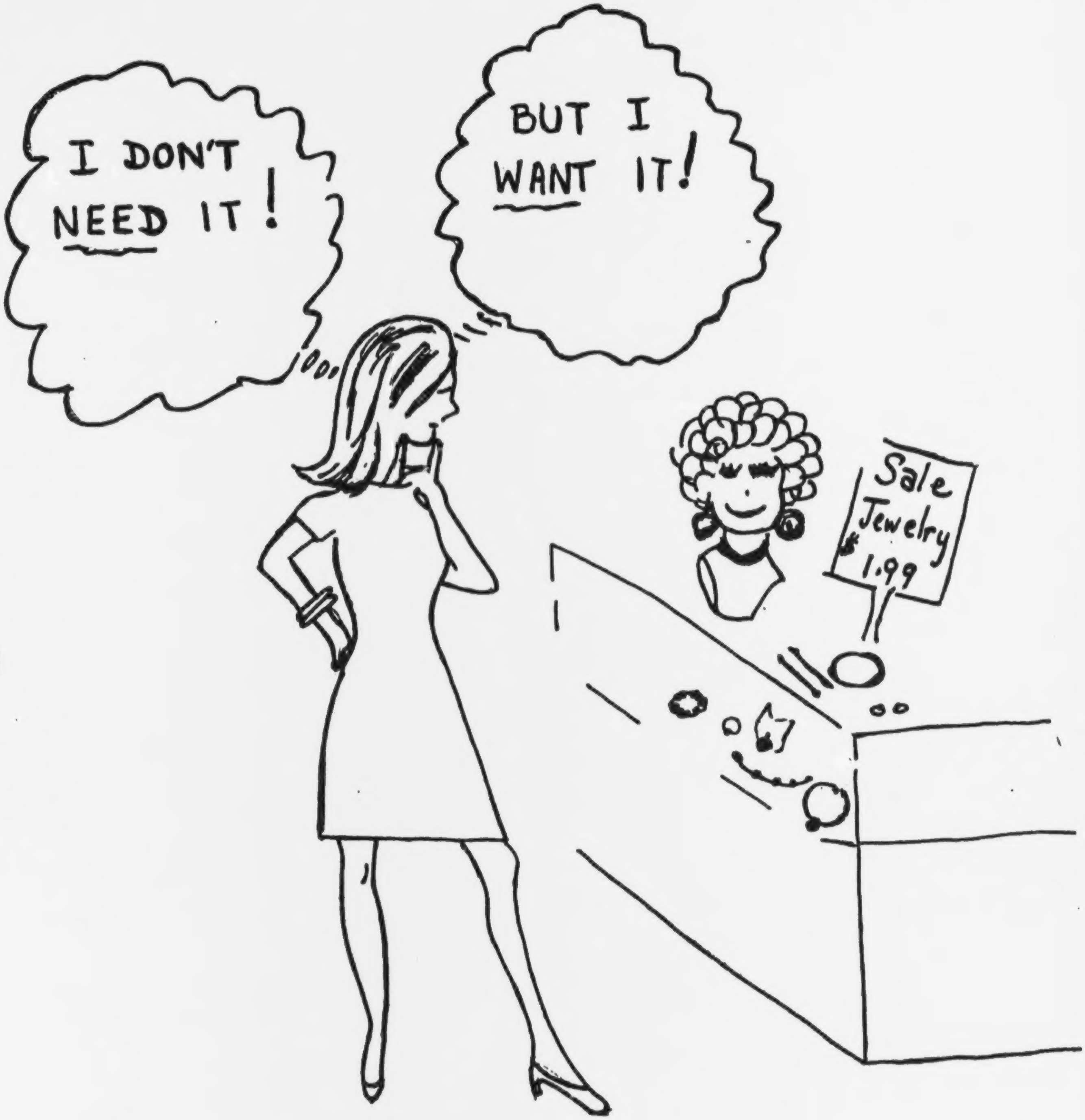
OUTLINE--Makes necessary the sketching or indicating of main points.

REVIEW--Compels going over a subject deliberately and giving it a critical examination.

SUMMARIZE--Asks for the presentation of a subject in a concise and compact manner.

TRACE--Requires following, in detail, the development or progress of some subject.

VERIFY--Exacts proof that a thing is true.


I DON'T NEED IT!
BUT I WANT IT!
Sale Jewelry $1.99

RATIONAL AND EMOTIONAL MOTIVES MAY CONFLICT

Personal Selling
83.11

# KNOW YOUR CUSTOMER

NEEDS

INTERESTS

CHARACTERISTICS

BUYING MOTIVES

# STUDY THE CUSTOMER

I. Know Why People Buy.

  A. People buy to satisfy needs and desires.

  B. Decisions to buy are influenced by reason and emotion.

  C. Reason and emotion may conflict in the customer's mind.

II. Analyze Customer Moods.

  A. Impulsive Mood

  B. Deliberate Mood

  C. Undecided Mood

  D. Decided Mood

  E. Friendly Mood

  F. Silent, Unresponsive Mood

III. Practice the "Golden Rule."

  A. Define empathy.

  B. Develop empathy.

  C. Practice empathy.

# TEN LISTENING TECHNIQUES

1. STOP TALKING!
   You cannot listen if you are talking.
   Polonius (Hamlet): "Give every man thine ear, but few thy voice."

2. PUT THE TALKER AT EASE.
   Help him/her feel that he/she is free to talk.
   This is often called a "permissive environment."

3. SHOW HIM/HER THAT YOU WANT TO LISTEN.
   Look and act interested. Do not read your mail while he/she talks.
   Listen to understand rather than to reply.

4. REMOVE DISTRACTIONS.
   Don't doodle, tap, or shuffle papers.
   Will it be quieter if you shut the door?

5. EMPATHIZE WITH HIM/HER.
   Try to put yourself in his/her place so that you can see his/her point of view.

6. BE PATIENT.
   Allow plenty of time. Do not interrupt him/her.
   Don't start for the door or walk away.

7. HOLD YOUR TEMPER.
   An angry person gets the wrong meaning from words.

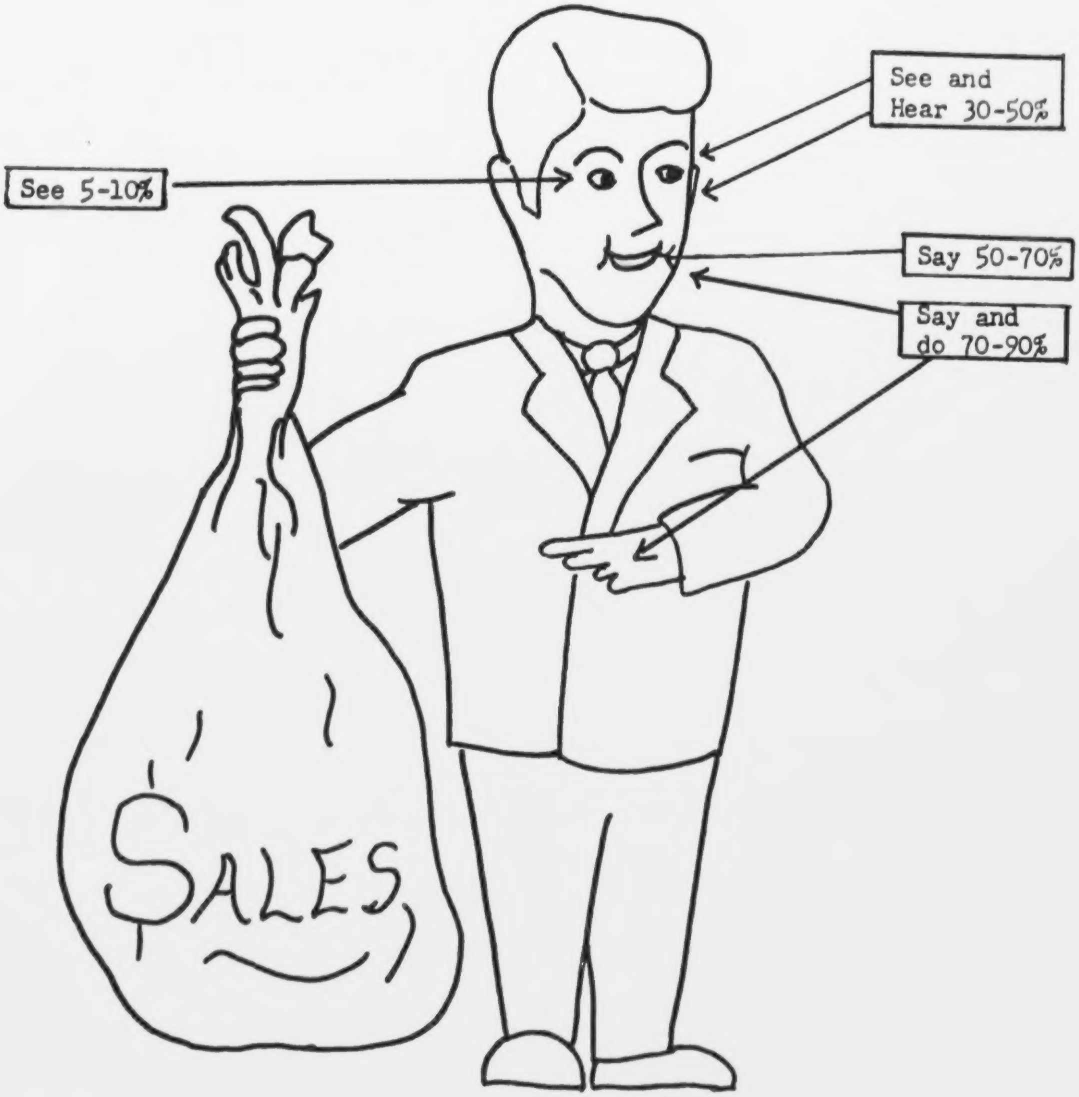
8. GO EASY ON ARGUMENT AND CRITICISM.
   This puts him/her on the defensive. He/she may "clam up" or get angry.

9. ASK QUESTIONS.
   This encourages him/her and shows you are listening.
   It helps to develop points further.

10. STOP TALKING!
    This is first and last, because all other commandments depend on it. You just can't do a good listening job while you are talking.

Nature gave us two ears but only one tongue, which is a gentle hint that we should listen more than we talk.

## CUSTOMER PARTICIPATION


See 5-10%
See and Hear 30-50%
Say 50-70%
Say and do 70-90%
$ALES

INVOLVE ALL THE SENSES

People learn:

5-10% of what they see

30-50% of what they see and hear

50-70% of what they say

70-90% of what they do and say

TM-9

## "DIFFICULT CUSTOMERS"

Salespeople sometimes have difficulty meeting the needs of their customers. This occurs most frequently when the customers demonstrate the following attitudes and behaviors:

1. Gripe and complain about products and services without justification.
2. Make unreasonable demands.
3. Do not maintain objective viewpoints.
4. Feel that all business persons are greedy, unfair, and selfish.
5. Desire to get something for nothing.
6. Feel that they are superior human beings and that all others (including salespeople) are inferior.
7. Do not know what they want.
8. Have difficulty making buying decisions.
9. Have their minds set on one product, one price, one brand, etc., and are unwilling to consider other equal alternatives.
10. Voice their opinions in loud, boisterous voices.

TM-10

# "WAYS TO HANDLE DIFFICULT CUSTOMERS"

1. Remain calm-no matter what!
2. Show an interest in and concern for the customer; always listen intently when he speaks.
3. Use tact in all conversations.
4. Be courteous to the customers at all times.
5. Maintain a positive attitude and the belief that the "customer is king."
6. Demonstrate your knowledge and understanding of products, procedures, policies and "human behavior."
7. Maintain objective viewpoints.
8. Maintain self-control at all times; never argue with a customer or try to prove that you are right and he/she is wrong.
9. Ask questions. Try to obtain as much information as you can in order to better satisfy the customer's needs.
10. Go out of your way to make the customer feel important and special.

## "GENERAL PRINCIPLES TO OBSERVE IN CLOSING SALES"

1. Have a positive attitude.
2. Make it easy for the prospect to act.
3. Know when to close.
4. Display self-confidence.
5. Hold off giving the price.
6. Help the customer to concentrate.
7. Avoid negative closings.

TM-12

# BUYING SIGNALS--EXAMPLES

1. "I don't think that I would be particularly happy with the other color."
2. "I would have to have delivery today."
3. "Will it wear well?"
4. "I shouldn't even be considering this purchase today."
5. "What kind of guarantee do I receive?"
6. "Does this material require special care?"
7. "Are quite a few people buying this style of coat?"
8. "Could you bill me next month?"
9. When the customer steps back for a second and looks.
10. When the customer scratches his/her chin or lays his/her finger to the side of the face.
11. When the customer picks up the package and reads the label.
12. When the customer demonstrates the product to himself/herself.
13. When the customer sets an item aside from the rest of the group.
14. When the customer fondles the article.
15. When the customer nods his/her head in an unconscious manner.

# WHEN TO EXECUTE THE CLOSE

1. When the buyer gives the salesperson a closing clue.
2. When the buyer gives the salesperson hearty and enthusiastic agreement on one of the salesperson's points or to one of the salesperson's leading questions.
3. When the buyer accepts proof of advantage in a decided manner.
4. When the salesperson has just completed an impressive demonstration of his/her product.
5. When the salesperson has disposed of some buyer-resistance in a devastating way.
6. Whenever buyer-desire seems most intense and buyer conviction seems strongest.

# SUGGESTION SERVICE SELLING

S uggestion Selling should be thought of as Service Selling to customers.
U nderstood also as the salesperson's effort that results in the sale of additional merchandise.
G enerally people can be influenced by the power of suggestion.
G oods known as staples, necessities, impulse, and new merchandise items make good suggestions.
E asier to suggest items closely related to the first purchase.
S eventy-one percent of 2,000 customers surveyed liked to have salespersons suggest specials.
T act must be used in Suggestion Service Selling.
I nterest in what the customer is to do with goods he/she purchases helps to suggest additional items.
O ffer good reasons for recommending additional merchandise.
N ot a good long term policy ever to force additional goods upon your customer.

S uggestions on How to Increase Customer's Purchases:
E xpose customer to high priced merchandise.
R ecommend larger quantities.
V olunteer and show new uses for merchandise.
I nterest customer by showing specials and advertised goods.
C enter attention upon merchandise for special occasions.
E ngage attention of customer by suggesting and showing new merchandise.

S uggest and show related merchandise.
E mhasize WHY it is worthwhile for customer to accept your suggestion(s).
L et your counter and store displays help you in suggesting additional items.
L earn related goods sold in other departments and suggest them.
I nterest customers in additional merchandise by demonstrations and dramatizations.
N otice closely reactions of customer in case of S.S.S.
G oodwill for you and your store can be gained when you handle "Suggestion Selling" as a service.

# EVALUATION MEASURES AND KEYS
# (COMPETENCY / TEST - ITEM BANK)

## TABLE OF SPECIFICATIONS FOR TEST CONSTRUCTION

GRAM AREA Marketing and Distributive Education

COURSE NAME Fashion Merchandising

UNIT Personal Selling

| Competency | EXPECTED STUDENT OUTCOME | | | | % Importance | Total No. of Items |
|---|---|---|---|---|---|---|
| | Cognitive Level* I | II | III | Performance | | |
| 028. Convey a positive image of self and the firm. | X | | | | | |
| 029. Treat others as individuals. | X | | | | | |
| 030. Utilize appropriate sales approaches. | X | X | X | X | | |
| 031. Identify and analyze customer's needs relative to apparel and accessories. | X | | X | | | |
| 032. Observe customer's outward appearance, expression, and manner. | X | | | | | |
| 033. Ask pertinent questions to identify customer needs, wants, interests, etc. | X | | X | X | | |
| 034. Demonstrate merchandise by getting it into customers' hands, trying it on, etc. | X | | X | X | | |
| 035. Compare prices and price lines for customers for items of apparel and accessories. | X | | | | | |
| 036. Inform customers of substitute merchandise if requested items are unavailable. | X | X | X | | | |
| 037. Justify price of an item in terms of merchandise features and benefits. | X | | | | | |
| 038. Tactfully handle difficult customers. | X | X | | X | | |
| 039. Anticipate and/or resolve customer objections. | | X | X | X | | |
| 040. Obtain agreement and commitment from the customer. | X | X | X | X | | |
| 041. Thank customers to encourage repeat business. | X | X | | X | | |
| 042. Suggest related items, accessory items, etc., to obtain multiple sales. | X | X | | X | | |
| 043. "Trade up" when the opportunity arises, pointing out additional features. | X | X | X | | | |
| 044. Maintain customer card file or clientele book to encourage repeat business. | X | | | | | |
| 045. Process charge or cash transactions. | X | X | | X | | |
| 046. Accurately calculate the exact amount of a customer's purchase. | | | X | X | | |
| 047. Accurately compute employee discounts, delivery, alteration, and layaway charges. | | | X | X | | |
| 048. Write sales checks legibly so that error can be eliminated. | | | | X | | |

*LEVEL I - Recall, II - Comprehension, III - Application

## TABLE OF SPECIFICATIONS FOR TEST CONSTRUCTION

PROGRAM AREA Marketing and Distributive Education

COURSE NAME Fashion Merchandising

UNIT Personal Selling

| Competency | EXPECTED STUDENT OUTCOME | | | | % Importance | Total No. of Items |
|---|---|---|---|---|---|---|
| | Cognitive Level* I | II | III | Performance | | |
| 049. Process layaways. | X | | | X | | |
| 050. Make refunds or exchanges in accordance with company policy. | X | | | X | | |
| 051. Write gift certificates and special orders. | | | | X | | |
| 052. Sell merchandise over the telephone. | X | X | X | | | |
| 053. Sell to customers in a self-service store while performing storekeeping. | X | | | | | |
| 054. Work with more than one customer simultaneously in a courteous manner. | | X | | | | |
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*LEVEL I - Recall, II - Comprehension, III - Application

COMPETENCY 028: Convey a positive image of self and the firm.

TEST ITEM 028-00-11

INSTRUCTIONS TO STUDENTS: Place an "X" in the blank beside the following which indicate an individual is conveying a positive image of self and/or the firm.

_____ 1. Is apathetic
_____ 2. Is achieving
_____ 3. Is boastful
_____ 4. Is aggravating
_____ 5. Is cooperative
_____ 6. Is industrious
_____ 7. Is complaining
_____ 8. Is dependable
_____ 9. Is enthusiastic
_____10. Is happy
_____ 11. Is optimistic
_____ 12. Is prompt
_____ 13. Is conceited
_____ 14. Is pessimistic
_____ 15. Is slouchy
_____ 16. Is self-confident
_____ 17. Is tactful
_____ 18. Is tardy
_____ 19. Is willing to assist
_____ 20. Is well groomed

**COMPETENCY 029:** Treat others as individuals.

TEST ITEM 029-00-11

INSTRUCTIONS TO STUDENTS: Read each of the following statements about customer types, moods, personalities, and buying motives. Determine if each statement is true or false. Write the correct response (true or false) in the blank to the left of each statement.

_____ 1. A store advertisement of a one-week sale on winter boots would appeal most directly to a customer's emotional buying motives.

_____ 2. The decided customer knows what he/she wants to buy.

_____ 3. The undecided customer is the most difficult to sell.

_____ 4. With the suspicious customer, the salesperson should use a defensive approach.

_____ 5. The buying motive most often associated with purchases of fashion apparel is the desire for social approval.

COMPETENCY 030: Utilize appropriate sales approaches.

TEST ITEM 030-00-11

INSTRUCTIONS TO STUDENTS: Read the following questions and give written responses as instructed for each.

1. Define the term "approach."
2. List three goals of an approach.

TEST ITEM 030-00-12

INSTRUCTIONS TO STUDENTS: In Column I are four case situations in which customers are ready to be approached by the salesperson. From the lists of opening statements in Column II, select the one which is most appropriate for each situation in Column I. Record the letter of your choice in the space provided to the left. Explain the reason for your selections.

| Column I | Column II |
|---|---|
| ___ 1. A customer is in the men's department and has approached a table of men's shirts. He picks up two shirts and seems to be comparing them. | A. "May I help you?"<br>B. "May I tell you about these shirts?"<br>C. "Those shirts are especially good buys." |
| ___ 2. A female customer is shopping in the men's department. She is observing a display of colored shirts and ties. | A. "Hi, is there anything I can do for you today?"<br>B. "May I interest you in that shirt and tie?"<br>C. "May I show you something?" |
| ___ 3. A female customer has entered the lingerie department. She is casually walking through the department. | A. "Good morning, how are you today?"<br>B. "That gown is a tremendous buy."<br>C. "That robe looks especially nice on you." |
| ___ 4. You have just returned from break and you immediately notice a customer standing in front of the wall unit of sport coats and suits. He is trying on a sport coat. | A. "Hello."<br>B. "Is anyone helping you?"<br>C. "That sport coat looks very nice on you." |

Explain the reason for your selections. You will respond to each of the case numbers.

1.

2.

3.

TEST ITEM 030-00-13

INSTRUCTIONS TO STUDENTS: Read the two case problems and below each explain when you should approach each customer and what approach you should use.

CASE PROBLEM 1: A customer has entered your department and has informed you that she is "just looking." As the customer is walking around the department, you notice that she has returned to the same displayed dress twice. After looking at the dress for the second time, she continues to browse around the store.

1. When should the customer be approached?
2. What approach should be used?

CASE PROBLEM 2: There are two salespersons in the Children's Department of Logan's. There is only one customer in the department, and she is being helped by salesperson "A". Salesperson "A" has a telephone call and leaves the customer. After five minutes you notice the customer starting toward the exit.

1. When should the customer be approached?
2. What approach should be used?

TEST ITEM 030-00-14

INSTRUCTIONS TO STUDENTS: Read the following case study, then answer the questions about the situation.

CASE STUDY: You are working as a Marketing and Distributive Education student-trainee in the men's department of Logan's. You hope to become department manager and are working hard to learn all you can and to receive all the necessary training.

While you are putting up the new shipment of sweaters, Mrs. Jones enters the men's department. You greet Mrs. Jones by asking if you can assist her. She tells you she wants a pair of slacks for her husband. After chatting for a minute you show her the slacks.

Mrs. Jones says little during your presentation. Although she neither disagrees with what you say or voices an objection, she also does not seem willing to buy the slacks.

Analyze the situation by evaluating the steps of the sale to see if improvements could be made. Answer the following questions as you make your analysis?

1. What, if anything, could be done to improve the opening?
2. Give two examples of questions you could ask to help better determine her specific needs?
3. Since Mrs. Jones does not seem willing to buy, she may have an objection. How could you discover the possible objection?
4. What could you do to better lead to a close? What signals might you look for?

TEST ITEM 03Q-00-15

INSTRUCTIONS TO TEACHER: Have the students prepare a sales demonstration for an item of apparel of their choice. On the day of their presentation, they should bring the item to class, along with accessories or related items which might be used for suggestive selling. They should outline their plans for dealing with each of these steps of the sale: Approach, Presentation, Objections, Close, and Suggestion Selling. Have the students actually conduct the demonstration in class with you or a business person knowledgeable in selling techniques serving as the customer. Be consistent with the role playing with each student. Each demonstration should be limited to a maximum of ten minutes. Use the rating sheet provided for evaluating student performance, circling only one figure for each question (Example: 0 1 ② 3).

INSTRUCTIONS TO STUDENT: You are to prepare a sales demonstration for an item of your choice. On the day of your presentation, bring the item to class, along with any accessories or related items you might wish to use for suggestive selling. You should plan to deal with each of these steps of a sale in your demonstration: Approach, Presentation, Objections, Close, and Suggestion Selling. Outline your plans on paper. Your teacher or a business person knowledgeable in selling will serve as your customer and will evaluate your performance using a rating sheet. Your sales demonstration will be completed in class and will be limited to a maximum of ten minutes.

## EVALUATION SHEET

Student's Name____________________

Evaluate the student in the five areas below: Approach, Product Presentation, Handling Objections, Close, and Suggestion Selling. There are generally five areas of proficiency going from poor to excellent with poor being completely unsatisfactory and excellent being oustanding in that area. Different point values for each statement are also given, indicating the importance of one over the other. Circle the point value you feel the student deserves, circling only one figure for each question (Example: 0 1-② 3).

| | Poor | Below Average | Average | Above Average | Excellent |
|---|---|---|---|---|---|
| I. Approach (15) | | | | | |
| A. Was the approach or opening remark suitable for the selling situation? | 0-1 | 2 | 3 | 4 | 5 |
| B. Was the participant prompt in the approach? | 0 | | 1 | | 2 |
| C. Did the participant gain the customer's interest? | 1 | 2 | 3 | 4 | 5 |
| D. Did the participant possess an "air of confidence?" (Well-groomed for selling situation and store image, voice clear.) | 0 | | 1-2 | | 3 |
| II. Product Presentation (40) | | | | | |
| A. Were the wants and desires of the customer determined clearly? (Did the participant listen to the customer?) | 0-1 | 2-3 | 4-5-6 | 7-8 | 9-10 |
| B. Were customer benefits presented related to customer's needs? | 1 | 2 | 3 | 4 | 5 |
| C. Did the participant show genuine enthusiasm for the merchandise? | 1 | 2 | 3 | 4 | 5 |
| D. Was the merchandise demonstrated in such a way as to create interest and desire? | 0-1 | 2-3 | 4-5-6 | 7-8 | 9-10 |
| E. Did the customer get an opportunity to participate in the demonstration? | 0-1 | 2-3 | 4-5-6 | 7-8 | 9-10 |

Evaluation Sheet--cont'd.

| | Poor | Below Average | Average | Above Average | Excellent |
|---|---|---|---|---|---|
| III. Handling Objections (15) | | | | | |
| A. Did the participant show interest in the objection? | 0-1 | 2 | 3-4 | 5 | 6 |
| B. Were all objections handled? | No | 0 | | Yes | 2 |
| C. Was the objection overcome tactfully and with respect? (Did the participant's answers have credibility? Were the answers clear?) | 0-1 | 2 | 3-4-5 | 6 | 7 |
| IV. Close (20) | | | | | |
| A. Did the participant take advantage of opportunities to close? | 0-1 | 2 | 3 | 4 | 5 |
| B. Was the close timely in relation to the overall demonstration? | 0-1 | 2 | 3 | 4 | 5 |
| C. Did the participant show ability to question, observe, and listen in order to complete a successful sale? | 0-1 | 2 | 3 | 4 | 5 |
| D. Did the participant thank the customer? | 0-1 | 2 | 3 | 4 | 5 |
| V. Suggestion Selling (20) | | | | | |
| A. Was additional merchandise suggested to the customer? (If so, mark in appropriate space, B & C; if not record 0 points.) | No | 0 | | | |
| B. Was suggestion merchandise properly related to originally bought merchandise? | 0-1 | 2 | 3 | 4 | 5 |
| C. Did the participant adequately present the suggestion item? (Was the process a smooth and natural part of the sale?) | 0-1 | 2 | 3 | 4 | 5 |

Total Points ______________

100 Possible Points

COMPETENCY 031: Identify and analyze customer's needs relative to apparel and accessories.

TEST ITEM 031-00-11

INSTRUCTIONS TO STUDENTS: In Column I is a list of apparel and accessories items or services. From the list of needs in Column II, select the need(s) you feel would be satisfied if the customer bought the item. Record the letter(s) of your choice in the space provided to the left.

Column I

____ 1. Jewelry
____ 2. Golf shoes
____ 3. High fashion dress
____ 4. Raincoat
____ 5. Fur storage

Column II

A. Convenience
B. Curiosity
C. Fear
D. Love
E. Money gain
F. Pleasure
G. Self-preservation
H. Social approval
I. Variety

TEST ITEM 031-00-12

INSTRUCTIONS TO STUDENTS: Read the case problem below. Using the form below, identify the customer's needs and wants and list the techniques you used to determine them.

CASE PROBLEM: Joanie Peterson, a 19 year old, who has recently graduated from high school is working on her first job. She has just received her first paycheck. During her high school years, Joanie had to work part-time to earn money to go to school. She never had enough money to buy very nice clothes for her wardrobe. Now Joanie needs to use her first paycheck to buy two new outfits which would be appropriate for a working girl.

| NEEDS TO BE CONSIDERED | TECHNIQUES TO USE |
|---|---|
| | |

TEST ITEM 031-00-13

See Test Item 030-00-14.

**COMPETENCY 032:** Observe customer's outward appearance, expression, and manner to determine appropriate size, style, color, and pattern preferences.

TEST ITEM 032-00-11

INSTRUCTIONS TO STUDENTS: Read each of the following statements about observing the customer. Determine if each statement is true or false. Write the correct response (true or false) in the blank to the left of each statement.

____ 1. A customer's outward appearance is an adequate indication of the price range you should suggest.

____ 2. Eliminating unflattering styles before the customer begins the fitting process can save the customer's time and temper.

____ 3. A person's facial shape should influence selection of certain clothing items.

____ 4. The first priority in selecting color is the customer's personal preference.

____ 5. A customer's expression can convey preferences of clothing items.

COMPETENCY 033: Ask pertinent questions to identify more clearly customer needs, wants, interests, etc.

TEST ITEM 033-00-11

INSTRUCTIONS TO STUDENTS: Read each of the following statements about questioning the customer. Determine if each statement is true or false. Write the correct response (true or false) in the blank to the left of each statement.

____ 1. Questions directed to customers during a sale should be of an impersonal nature.

____ 2. Questions used to determine a customer's preferences should be phrased to get a positive response.

____ 3. It is appropriate to question who the item is for.

____ 4. As many questions as possible should be designed for an answer of yes or no.

____ 5. It is important to get merchandise into the customer's hands as you question.

TEST ITEM 033-00-12

See Test Item 030-00-14.

TEST ITEM 033-00-13

See Test Item 030-00-15.

**COMPETENCY 034:** Demonstrate merchandise by getting it into customer's hands, having him/her try it on, etc., to create desire and attachment to the item.

TEST ITEM 034-00-11

INSTRUCTIONS TO STUDENTS: Read each of the following incomplete sentences. Determine which of the possible completion choices is most appropriate for each statement. Write the letter of this response in the space provided to the left.

____ 1. The _____ is considered to be the heart of the sale.

A. Approach
B. Close
C. Objection
D. Presentation

____ 2. In demonstrating clothing, it is recommended that _____ items be shown at a time.

A. 1-2
B. 2-3
C. 3-4
D. 4 or more

____ 3. In a sales presentation, the salesperson can most easily appeal to a customer's sense of _____.

A. Hearing
B. Sight
C. Smell
D. Taste

____ 4. Of the four steps in selling, the one most directly involved in the presentation is _____.

A. Action
B. Attention
C. Desire
D. Interest

____ 5. Customer participation develops within the customer a feeling of _____.

A. Independence
B. Loyalty
C. Ownership
D. Respectability

**TEST** ITEM 034-00-12

INSTRUCTIONS TO STUDENTS: Read the following case problem about merchandise presentation. Answer the questions about involving the customer in the presentation.

CASE PROBLEM: Martha Anderson is a Marketing and Distributive Education student-trainee in the Men's Department of Logan's. She has just been approached by Mr. Day, her history teacher. He tells her he is interested in one of Logan's advertised shirts to wear to school. The descriptive features of this particular group of shirts follows:

Fabric, material: 50% polyester/50% cotton
Styles, shapes: Short sleeves; dress shirt; button-down collar
Colors: Pastel solids; stripes in white and blue, white and brown, or white and green
Sizes: 14 1/2 to 17
Care: Machine washable and dryable; permanent press
Price: Sale price of $10, regularly $16 for solid colors and $17 for stripes

1. To which of the customer's five senses should Martha attempt to appeal? Why?

2. Identify two techniques she could use to get Mr. Day to participate in the presentation.

3. Give one reason for encouraging the customer to particpate.

TEST ITEM 034-00-13

See Test Item 030-00-15.

**COMPETENCY 035:** Compare prices and price lines for customers for items of apparel and accessories.

TEST ITEM 035-00-11

INSTRUCTIONS TO STUDENTS: Read each of the following incomplete sentences. Determine which of the possible completion choices is most appropriate for each statement. Write the letter of this response in the space provided to the left.

____ 1. When presenting merchandise to the customer, the salesperson should first show an item from the _____ priced line.

A. Budget
B. Higher
C. Lower
D. Medium

____ 2. The most appropriate choice of words to describe the lower-priced line is:

A. Cheapest
B. Least expensive
C. Lowest priced
D. Most economical

____ 3. In order to adequately compare prices and price lines, the salesperson must know:

A. The exact monetary difference between each price or price line.
B. The features and benefits of each price or price line.
C. The names of the vendors from which the merchandise was purchased.
D. The prices the store paid for the merchandise.

____ 4. Customers become used to price lines which apply to:

A. Their economic status.
B. Their favorite styles, sizes, and colors.
C. The location in which they live.
D. The types of merchandise their friends buy.

____ 5. In comparing price lines for the customer, the salesperson must be able to:

A. Compute the difference between price lines.
B. Convince the customer to buy the higher priced item.
C. Determine the percentage of markup on the price lines.
D. Justify price to himself/herself and the customer.

**COMPETENCY 036:** Inform customers of substitute merchandise if requested items are not available.

TEST ITEM 036-00-11

INSTRUCTIONS TO STUDENTS: Read the following case problem dealing with substitute merchandise. Answer the questions below the case problem.

CASE PROBLEM: You are a salesperson in the Ladies' Department of Logan's. A decided shopper tells you she wants a pastel pink tie-blouse. You explain that you do not have any tie-blouses and realize you should offer a substitute.

1. From the items below, choose the best one to offer as a substitute.
   - A. A pastel pink dress with a tie
   - B. A pastel pink blouse with a button-down collar
   - C. A pastel pink blouse with round neckline and matching scarf
   - D. A pastel pink blouse with a V-neckline
2. Why did you make this choice?

TEST ITEM 036-00-12

INSTRUCTIONS TO STUDENTS: The following situations involve the need to offer substitute merchandise for that originally requested. Following each of the originally requested items listed below are two comments the salesperson could make. Select the one most appropriate to use in a substituting situation. Place the letter of that question in the space to the left of the item number.

____ 1. A 14K gold necklace, 15" long

A. "I'm sorry, we don't have any 15" chains. We do, however, have some 16" chains which can be adjusted."

B. "I'm sorry, we don't have any 15" chains. The 17" is more popular anyway!"

____ 2. A mid-calf length velour robe in rust color--something warm and cozy, size medium

A. "I'm sorry, we are out of medium in that color and fabric. Perhaps you'd like to browse through the rack."

B. "We are out of medium in the rust velour mid-calf--we do have it in full length and this would be even warmer."

____ 3. A toddler's footed pajamas, size 2 1/2 T

A. "I'm sorry, we don't have 1/2 sizes in toddler's clothing."

B. "I'm sorry, toddler's clothing isn't made in 1/2 sizes. Would there be something else?"

TEST ITEM 036-00-13

INSTRUCTIONS TO STUDENTS: Occasionally a salesperson must substitute merchandise for that originally requested. Rank the following steps in the sequential order they should be performed in the substitution process. In the blank beside each statement, write the number of this step as it would occur in sequential order.

____ Recommend a similar item that fits the need.

____ Point out buyer benefits of the substitute.

____ Explain the relationship between the desired item and the recommended substitute.

____ Determine the customer's need.

**COMPETENCY 037**: Justify price of an item in terms of merchandise features and benefits.

**TEST ITEM 037-00-11**

INSTRUCTIONS TO STUDENTS: Read each of the following statements about justifying price of an item in terms of merchandise features and benefits. Determine if each statement is true or false. Write the correct response (true or false) in the blank to the left of each statement.

____ 1. If a customer objects to price, the salesperson should immediately present a lower priced item.

____ 2. The salesperson should not apologize for price.

____ 3. The most effective way to handle an objection to price is to show that the value of the merchandise justifies the price.

____ 4. The product itself is probably the most talked-about type of objection.

____ 5. One way to justify price is to point out hidden features of the merchandise.

**COMPETENCY 038:** Tactfully handle difficult customers.

TEST ITEM 038-00-11

INSTRUCTIONS TO STUDENTS: Read each of the following statements about handling difficult customers. Determine if each statement is true or false. Write the correct response (true or false) in the blank to the left of each statement.

____ 1. The salesperson should try to make the customer feel important.

____ 2. If a customer becomes unbearable in a sales situation, the salesperson should turn around and leave before an argument develops.

____ 3. When assisting a rude customer, remember the rule "The customer is always right," and continue to be polite and courteous.

____ 4. Regardless of how difficult the customer may become, the salesperson should remain calm.

____ 5. The salesperson should avoid asking questions since the customer may think he/she is being nosy.

TEST ITEM 038-00-12

INSTRUCTIONS TO STUDENTS: In Column I are types of difficult customers. From the methods of handling customers in Column II, select the one most effective for each customer type in Column I. Record the letter of your choice in the space provided to the left.

| Column I | Column II |
|---|---|
| ____ 1. Indifferent | A. Efficient service |
| ____ 2. Inquisitive | B. Gentleness |
| ____ 3. Insulting | C. Knowledge |
| ____ 4. Intelligent | D. Patience |
| ____ 5. Timid and sensitive | E. Self-control |
| ____ 6. Tired and cross | F. Silence |
| | G. Tact |

TEST ITEM 038-00-13

See Test Item 030-00-15.

COMPETENCY 039: Anticipate and/or resolve customer objections.

TEST ITEM 039-00-11

**INSTRUCTIONS TO STUDENTS**: Read each of the following incomplete sentences. Determine which of the possible completion choices is most appropriate for each statement. Write the letter of this response in the space provided to the left.

____ 1. When the salesperson wishes to agree with the customer's objection but feels that another angle should be presented, the salesperson should use the:

A. Direct denial method.
B. Question method of answering the objection.
C. Superior point method.
D. Yes, but method.

____ 2. When the salesperson wishes to concede that the objection made by the customer is correct, but also wishes to point out advantages of the product that more than offset the disadvantage, the salesperson should use the:

A. Boomerang method.
B. Indirect denial method.
C. Superior point method.
D. Yes, but method.

____ 3. When the salesperson wishes to point out to the customer that the soft leather to which the customer has just objected will make the shoes wear better, the salesperson should use the:

A. Boomerang method.
B. Demonstration method.
C. Explanation method.
D. Yes, but method.

____ 4. If the salesperson feels that the objection is based on ignorance of the facts, the salesperson should use the:

A. Direct denial method.
B. Explanation method.
C. Question method.
D. Yes, but method.

____ 5. Which method is the salesperson using when the customer is prodded to answer his own objection by asking him/her a series of questions?

A. Explanation method.
B. Demonstration method.
C. Indirect denial method.
D. Question method.

TEST ITEM 039-00-12

See Test Item 030-00-14.

**TEST ITEM 039-00-13**

See Test Item 030-00-15.

COMPETENCY 040: Obtain agreement and commitment from the customer.

**TEST ITEM 040-00-11**

**INSTRUCTIONS TO STUDENTS**: From the following statements select those which are positive sales closers. Place an "X" in the blank to the left of the statements you choose.

____ 1. "Will you take this with you or do you want it delivered?"

____ 2. "How many would you like, three or four?"

____ 3. "Well, which do you want?"

____ 4. "Can I add it to your account?"

____ 5. "It is really up to you."

____ 6. "Shall we gift wrap it for you?"

____ 7. "Shall I get you a new one from the stockroom?"

**TEST ITEM 040-00-12**

**INSTRUCTIONS TO STUDENTS**: Read each of the following statements about closing a sale. Determine if each statement is true or false. Write the correct response (true or false) in the blank to the left of each statement.

____ 1. The first step in closing a sale is to obtain agreement that the customer wants the specific merchandise.

____ 2. In the psychological steps of selling, the fourth and final step is a part of the closing process and is called desire.

____ 3. A buying signal may take the form of a facial expression, a question or comment about the merchandise, or an act of handling the merchandise.

____ 4. After attempting a trial close and failing to obtain a commitment, you should thank the customer and ask him/her to come back again.

____ 5. The most widely used closing technique is the testimonial close.

TEST ITEM 040-00-13

See Test Item 030-00-14.

TEST ITEM 040-00-14

See Test Item 030-00-15.

**COMPETENCY 041**: **Thank customers** to encourage repeat business.

TEST ITEM 041-00-11

INSTRUCTIONS TO STUDENTS: Read each of the following statements about thanking the customer. Determine if each statement is true or false. Write the correct response (true or false) in the blank to the left of each statement.

____ 1. If the salesperson does not thank the customer, the departure may be abrupt and unfriendly.

____ 2. Thanking the customer does not influence future sales.

____ 3. The salesperson can be sure that the last contact between customer and salesperson is friendly by taking time to thank the customer for his/her business.

____ 4. The close is a final-decision step and the final contact between the salesperson and the customer.

____ 5. To insure that the final contact be friendly, the salesperson can give a final word of persuasion.

TEST ITEM 041-00-12

INSTRUCTIONS TO STUDENTS: From the following list of statements, select those which would be appropriate departure statements once the sales transaction has been completed. Place an "X" in the blank to the left of the statements you choose.

____ 1. "Thank you for shopping at Logan's. I'm sure you'll enjoy wearing your new sweater."

____ 2. "Come back when you need something else."

____ 3. "Tell your friends to ask for Larry when they visit Logan's."

____ 4. "Thank you for buying from us. And remember, we offer free moth protection storage in the summer."

____ 5. "Thank you, Mr. Lewis. I'm sure you'll enjoy your new suit. Hurry back to see us."

TEST ITEM 041-00-13

See Test Item 030-00-15.

**COMPETENCY 042:** Suggest related items, accessory items, etc., to obtain multiple sales.

**TEST ITEM 042-00-11**

**INSTRUCTIONS TO STUDENTS:** Read each of the following statements about suggestion selling. Determine if each statement is true or false. Write the correct response (true or false) in the blank to the left of each statement.

____ 1. A knowledge of the merchandise carried is one of the essentials of good salesmanship.

____ 2. You always suggest items at the beginning of a sale.

____ 3. When suggesting merchandise, the salesperson must word the suggestion so as not to convey the idea that the main purpose is to sell more merchandise.

____ 4. Most customers have a tendency to buy more than what they need at the time.

____ 5. Generally people can be influenced by the power of suggestion.

____ 6. Salespeople who suggest additional merchandise do not have the customer's satisfaction in mind.

____ 7. Most people need and want to buy merchandise other than that for which they came into the store.

____ 8. Some people are more susceptible to suggestion than others.

**TEST** ITEM 042-00-12

INSTRUCTIONS TO STUDENTS: Read each of the following statements. Determine which of the possible answers is the type of suggestion being illustrated by the statement. Write the letter of this response in the space provided to the left.

____ 1. "These socks are two pair for $1.50."

A. Larger quantity
B. Merchandise for special occasions
C. New merchandise
D. Related merchandise

____ 2. "This week we are offering a shirt at half price with the purchase of each suit."

A. Larger quantities
B. Merchandise for special occasions
C. New products or fresh stock
D. Specials

____ 3. "This wash-and-wear blouse would go well with the skirt you just selected."

A. Larger quantities
B. New or additional uses for merchandise
C. Related merchandise
D. Specials

____ 4. "Easter is only one week away. Perhaps you should look at our fine selection of hats."

A. Larger quantities
B. Merchandise for special occasions
C. Related merchandise
D. Specials

____ 5. "You asked for one pair of hose, but these are three pair in one package."

A. Larger quantities
B. Merchandise for special occasions
C. Related merchandise
D. Specials

____ 6. "You may also wear this scarf as a turban."

A. Larger quantities
B. New or additional uses for merchandise
C. Related merchandise
D. Specials

TEST ITEM 042-00-13

See Test Item 030-00-15.

**COMPETENCY 043**: "Trade-up" when the opportunity arises, pointing out additional features and benefits in the better merchandise.

TEST ITEM 043-00-11

**INSTRUCTIONS TO STUDENTS**: Read each of the following statements about "trading-up." Determine if each statement is true or false. Write the correct response (true or false) in the blank to the left of each statement.

____ 1. "Trading-up" should be used to benefit the customer.

____ 2. "Trading-up" is a form of high-pressure selling.

____ 3. When "trading-up" the salesperson should emphasize the superiority of the higher priced item.

____ 4. When "trading-up" the salesperson should point out features and benefits of the higher priced item.

____ 5. When "trading-up" the salesperson should point out similar features in both items.

TEST ITEM 043-00-12

**INSTRUCTIONS TO STUDENTS**: You are assisting a customer in Logan's Coat Department. The customer has selected a beige, lightweight, all-weather coat. You know your merchandise and are aware that you have the same color and style with a zip-out lining on sale for only $15 more, ordinarily $35 more. From the following list of selling statements which could be used in this sales situation, select those which would be positive statements in successfully "trading-up." Place an "X" in the blank to the left of the answers you choose.

____ 1. "The more expensive coat is really superior to the other one."

____ 2. "The increased wearability because of the zip-out lining would be worth the small difference in price, which in itself is a savings of $20 over the regular price."

____ 3. "Not only would you have the lightweight all-weather coat you desire, you could easily convert your investment into a warm, snug coat for those cold rainy or snowy days."

____ 4. "You really would not be happy with that coat. It's workmanship is inferior when compared to this one."

____ 5. "This coat offers all the benefits of the one you selected plus additional warmth by using the removable 100% wool lining."

TEST ITEM 043-00-13

INSTRUCTIONS TO STUDENTS: Read each of the following questions and incomplete sentences. Determine which of the possible answers or completion choices is most appropriate for each statement or question. Write the letter of this response in the space provided to the left.

____ 1. Which of the following sales statements is an example of "trading-up"?

A. "That is a nice sweater, but I'd like you to see our new velour styles. They are really a better quality and cost only $4 more."
B. "These hose are $1.59 a pair or three pair for $4."
C. "This tie will go well with the shirt you just selected."
D. "Valentine's Day is next Thursday. Be sure to see our "Sweetheart Ideas' display before you leave."

____ 2. "Trading-up" is a type of:

A. Approach
B. Objection
C. Sales presentation
D. Substitute selling

____ 3. In "trading-up" the salesperson is suggesting:

A. Higher-priced merchandise
B. Higher-profit-margin merchandise
C. Larger quantities of merchandise
D. Larger-sized merchandise

____ 4. Which of the following terms is most appropriate for the salesperson to use in a "trading-up" situation involving a pair of shoes?

A. More comfortable
B. More expensive
C. Superior quality
D. Superior workmanship

____ 5. In order to be prepared for "trading-up", what merchandise should the salesperson first show to the customer?

A. Budget-priced
B. High-priced
C. Low-priced
D. Medium-priced

**COMPETENCY 044**: Maintain a customer card file or clientele book to encourage repeat business.

TEST ITEM 044-00-11

**INSTRUCTIONS TO STUDENTS**: Place an "X" in the blank to the left of the following items which indicate ways a customer book or card file should be used.

____ 1. To call the customer at work.
____ 2. To call the customer once a week.
____ 3. To call the customer when a requested item arrives.
____ 4. To suggest merchandise for a special occasion.
____ 5. To mention a sale in progress.
____ 6. To provide personal information about a customer to other customers.
____ 7. To inform the customer of new arrivals.
____ 8. To provide customer size, preference, special interests, etc.
____ 9. To make social calls.
____ 10. To see if the customer is running low on regularly purchased items.

COMPETENCY 045: Process charge or cash transactions.

TEST ITEM 045-00-11

INSTRUCTIONS TO STUDENTS: In Column I are definitions of charge and cash transaction terms. From the list in Column II, select the one which is most appropriate for each definition in Column I. Record the letter of your choice in the space provided to the left.

Column I

____ 1. Customer charges merchandise and takes it with him/her

____ 2. Customer charges merchandise and has it delivered

____ 3. Customer pays for merchandise and takes it with him/her

____ 4. Customer pays for merchandise and has it delivered

____ 5. Sales form or cash register tape

____ 6. Maximum amount a customer can charge to his/her account

Column II

A. Cash-send

B. Cash-take

C. Charge-send

D. Charge-take

E. Credit limit

F. Receipt of purchase

G. Sales transaction

TEST ITEM 045-00-12

INSTRUCTIONS TO STUDENTS: Sequence the following tasks involved in a credit sale by listing the number of each step in the blank provided.

____ Totaling the sale

____ Obtaining the customer's credit card

____ Checking invalid list

____ Stamping the charge slip with the credit card

____ Computing the tax

____ Thanking the customer

____ Subtotaling the sale

____ Itemize the purchases

____ Obtain customer's signature

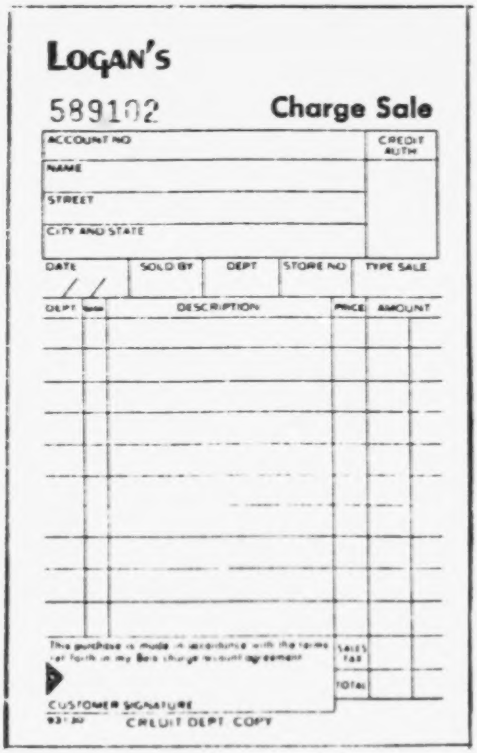
____ Give customer his/her copy of the sales slip

TEST ITEM 045-00-13

**INSTRUCTIONS TO STUDENTS**: Mrs. Ann Brown is one of your customers. Her address is 2604 Heather Drive in Greensboro, NC. Her ZIP Code is 27105. Her account number is 3210426944. She is purchasing these items:

- 1 pair shoes, size 1 1/2B, $10.25, Dept. 5
- 2 toddler shirts, size 2T, $4 each, Dept. 4
- 1 toboggan, small, $2.56, Dept. 4

Using a 4% state sales tax, correctly complete the charge slip using the charge slip provided. Your sales ID number is 26, Dept. 4, Store No. 1.



**LOGAN'S**

589102 **Charge Sale**

ACCOUNT NO

CREDIT AUTH

NAME

STREET

CITY AND STATE

| DATE | SOLD BY | DEPT | STORE NO | TYPE SALE |
|---|---|---|---|---|
| / / | | | | |

| DEPT | | DESCRIPTION | PRICE | AMOUNT |
|---|---|---|---|---|
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| | | | | |
| | | | SALES TAX | |
| | | | TOTAL | |

CUSTOMER SIGNATURE

CREDIT DEPT. COPY

COMPETENCY 046: Accurately calculate the exact amount of a customer's purchase.

TEST ITEM 046-00-11

INSTRUCTIONS TO STUDENTS: Read each of the following incomplete sentences. Determine which of the possible completion choices is most appropriate for each statement. Write the letter of this response in the space provided to the left.

____ 1. On a customer purchase of 2 pair of slacks @ $22.95 each and 2 shirts at $12.99 each with a sales tax rate of 4%, the sales form total would be:

A. $71.88
B. $77.46
C. $72.76
D. $74.76

____ 2. On a customer purchase of 1 pair of hose @ 2/$3.29, 1 slip @ $17.50 and 1 pair of bedroom slippers at $8.99, with a sales tax rate of 3 1/2%, the sales form total would be:

A. $29.13
B. $29.27
C. $28.14
D. $29.12

____ 3. On a customer purchase of 2 bibs @ $1.57, 3 receiving blankets @ 3 for $9.95, and 2 undershirts @ 3 for $5.50, with a sales tax rate of 5%, the sales form total would be:

A. $16.75
B. $17.59
C. $15.79
D. $17.95

____ 4. On a customer purchase of 1 pair of girls' jeans at $8.99, and 2 sweatshirts @ $9.99, with a sales tax rate of 4%, the sales form total would be:

A. $31.03
B. $30.13
C. $28.97
D. $31.13

____ 5. On a customer purchase of 1 girl scout dress @ $17.95, 1 hat @ $4.99, and 2 scarves @ $2.98, with a tax rate of 3%, the total on the sales form would be:

A. $27.79
B. $30.06
C. $29.77
D. $27.97

TEST ITEM 046-00-12

INSTRUCTIONS TO STUDENTS: Extend and total the following purchases.

1. 2 shirts @ $12.98 ________
   1 cap @ $4.99 ________
   1 pair socks @ $2.29 ________
   Subtotal ________
   4% sales tax ________
   Total ________

2. 1 handbag @ $19.25 ________
   1 pair shoes @ $25.95 ________
   2 pair hoses @ 1.19 ________
   Subtotal ________
   4% sales tax ________
   Total ________

3. 1 pair mittens @ $2.29 ________
   1 toboggan @ $3.49 ________
   1 scarf @ $4.46 ________
   Subtotal ________
   3% sales tax ________
   Total ________

4. 1 pair bootees @ $4.99 ________
   1 shawl @ $9.98 ________
   1 infant saque @ $6.79 ________
   2 infant kimonos @ $4.29 ________
   Subtotal ________
   5% sales tax ________
   Total ________

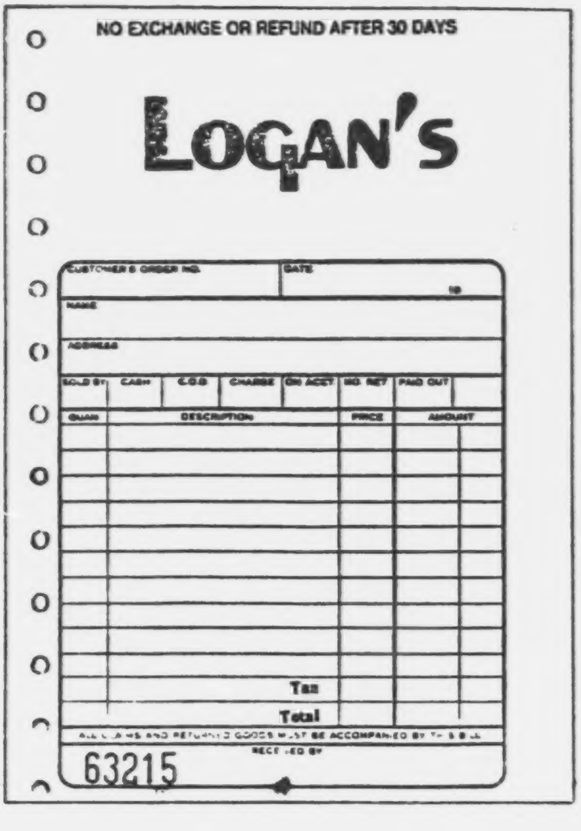
5. 1 pair pajamas @ $13.98 ________
   1 gown @ $12.98 ________
   1 robe @ $19.98 ________
   3 boy's undershirts @ 3/6.79 ________
   3 boy's briefs @ 3/6.99 ________
   Subtotal ________
   3 1/2% sales tax ________
   Total ________

**TEST ITEM 046-00-13**

INSTRUCTIONS TO STUDENTS: Read the following case problem involving cash and layaway purchases. Complete the forms below based on the information given in the case.

CASE PROBLEM: Mrs. Joann Thompson, a regular customer, has selected several items: 2 sweaters, Dept. 350, pink, small, $17.00 and green, small, $19.00; 1 skirt, Dept 351, plaid pleated, size 8, $32.00; 1 belt, Dept. 216, goldtone, $7.00; 2 pair hose, Dept 250, petite, $1.69 each; 1 stickpin, Dept 175, oval initial, $7.25. She wishes to pay for the hose and pin and put the rest in layaway. Her address is 111 Pine Circle, North Wilkesboro, NC 28659, phone 667-6666. You are Clerk #26 and work in Dept. 300. The sales tax rate is 4%.

1. Fill in the sales slip for the cash purchase.
2. Fill in the layaway agreement for the remaining items. Mrs. Thompson is required to pay a layaway service charge of $1.00 and a 20% deposit. She will pay $20 a month, paying in full within three months from the date of the sale.



NO EXCHANGE OR REFUND AFTER 30 DAYS

LOGAN'S

CUSTOMER'S ORDER NO. | DATE 19

NAME

ADDRESS

SOLD BY | CASH | C.O.D. | CHARGE | ON ACCT | MD. RET | PAID OUT

| QUAN | DESCRIPTION | PRICE | AMOUNT |
|---|---|---|---|
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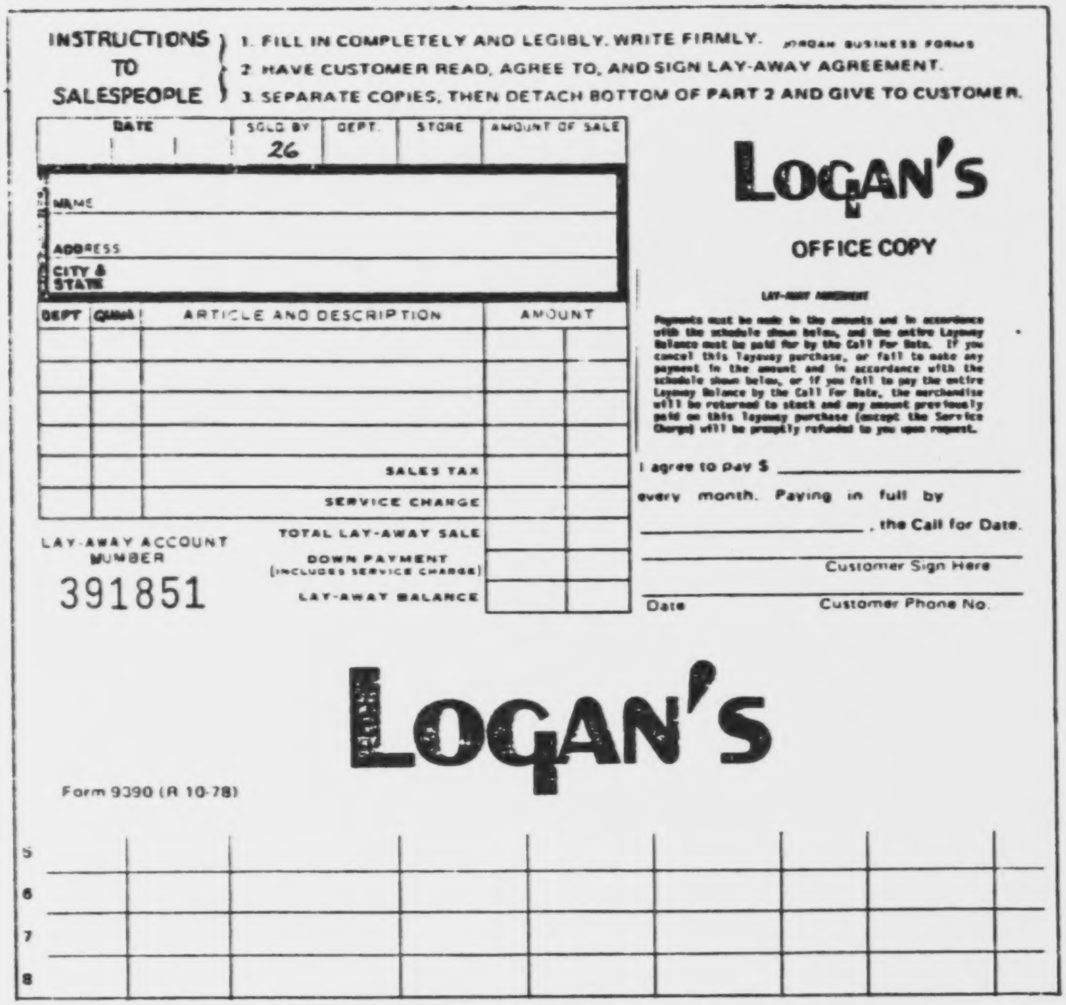
ALL CLAIMS AND RETURNED GOODS MUST BE ACCOMPANIED BY THIS BILL

63215 RECEIVED BY

TEST ITEM 046-00-13 (Continued)



**INSTRUCTIONS TO SALESPEOPLE**
1. FILL IN COMPLETELY AND LEGIBLY. WRITE FIRMLY.
2. HAVE CUSTOMER READ, AGREE TO, AND SIGN LAY-AWAY AGREEMENT.
3. SEPARATE COPIES, THEN DETACH BOTTOM OF PART 2 AND GIVE TO CUSTOMER.

JORDAN BUSINESS FORMS

| DATE | SOLD BY | DEPT. | STORE | AMOUNT OF SALE |
|---|---|---|---|---|
|  | 26 |  |  |  |

NAME

ADDRESS

CITY & STATE

| DEPT | QUAN. | ARTICLE AND DESCRIPTION | AMOUNT |  |
|---|---|---|---|---|
|  |  |  |  |  |
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|  |  |  |  |  |
|  |  | SALES TAX |  |  |
|  |  | SERVICE CHARGE |  |  |
|  |  | TOTAL LAY-AWAY SALE |  |  |
|  |  | DOWN PAYMENT (INCLUDES SERVICE CHARGE) |  |  |
|  |  | LAY-AWAY BALANCE |  |  |

LAY-AWAY ACCOUNT NUMBER

391851

**LOGAN'S**

**OFFICE COPY**

LAY-AWAY AGREEMENT

Payments must be made in the amounts and in accordance with the schedule shown below, and the entire Layaway Balance must be paid for by the Call For Date. If you cancel this layaway purchase, or fail to make any payment in the amount and in accordance with the schedule shown below, or if you fail to pay the entire Layaway Balance by the Call For Date, the merchandise will be returned to stock and any amount previously paid on this layaway purchase (except the Service Charge) will be promptly refunded to you upon request.

I agree to pay $ ____________________

every month. Paying in full by

____________________, the Call for Date.

____________________ Customer Sign Here

Date ____________________ Customer Phone No.

**LOGAN'S**

Form 9390 (R 10-78)

|  |  |  |  |  |  |  |  |  |
|---|---|---|---|---|---|---|---|---|
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**COMPETENCY 047:** Accurately compute employee discounts, delivery charges, alteration charges, layaway charges, etc., when writing saleschecks.

TEST ITEM 047-00-11

INSTRUCTIONS TO STUDENTS: Extend and total the following purchases. Compute employee discounts, delivery charges, alteration charges, layaway charges, and tax.

1. 2 shirts @ 11.97 __________
   1 cap @ 4.95 __________
   1 pair socks @ 2.19 __________

   Subtotal __________
   10% Employee Discount __________
   4% Sales Tax __________
   Total __________

2. 1 handbag @ 21.95 __________
   1 pair shoes @ 27.95 __________

   Subtotal __________
   Tax (3 1/2%) __________
   Service Charge 1.00
   20% Layaway Deposit __________
   Balance Due __________

3. 1 pair gloves @ 4.19 (10% discount) __________
   1 toboggan @ 4.59 (10% discount) __________
   1 scarf @ 7.00 (15% discount) __________
   Subtotal __________
   Employee Discount __________
   3% Sales Tax __________
   Total __________

4. 1 suit @ 94.00 __________
   1 shirt @ 12.50 __________
   2 ties @ 4.50 __________
   Alteration to suit 2.00

   Subtotal __________
   5% Sales Tax __________
   Total __________

5. 1 layette @ 29.95 __________
   1 snowsuit @ 19.95 __________

   Subtotal __________
   5% Sales Tax __________
   Delivery fee 1.96
   Total __________

TEST ITEM 047-00-12

INSTRUCTIONS TO STUDENTS: Read each of the following situations. Determine which of the possible answers or completion choices is most appropriate for each question or statement. Write the letter of this response in the space provided to the left.

____ 1. On an employee purchase of 2 blouses @ $13.98, 1 skirt @ $28.00 and 1 pair of slacks @ $31.98, with an employee discount rate of 15%, the amount of the sale (before taxes) would be:

A. $75.74
B. $74.75
C. $74.76
D. $87.94

____ 2. A customer purchases two snowsuits to be sent to her grandchildren in Boone. The snowsuits are sale priced @ $16.98 and $19.98 and weigh a total of 6 lbs. The tax rate is 4% and the delivery charge is 12¢ per pound. What is the total of this sale?

A. $38.44
B. $40.16
C. $38.16
D. $39.16

____ 3. A customer purchases a pair of slacks @ $18.00 which need to be hemmed, a shirt @ $13.98, and a skirt @ $21.99 which needs the waistband taken in. The alteration fee for the slacks is $1.00 and for the skirt is $1.25. With a sales tax rate of 4%, the total of the sales form would be:

A. $58.47
B. $57.48
C. $58.48
D. $59.47

____ 4. A customer wishes to put these items in layaway: a suit @ $89.95; a shirt @ $15.50; a belt @ $7.00, and a tie @ $4.99. There is a $1.00 service charge for layaways and a 20% deposit is required. The sales tax rate is 4%. What is the layaway balance?

A. $98.56
B. $99.56
C. $99.65
D. $100.65

____ 5. An employee purchases a $49 necklace on which there is a 30% discount and a $115 suit on which there is a 25% discount. The tax rate is 5%. What is the total amount the employee must pay for this sale?

A. $127.68
B. $126.85
C. $125.38
D. $126.58

**TEST ITEM 047-00-13**

See Test Item 046-00-13.

COMPETENCY 048: Write sales checks legibly so that error in delivery, quantities sent, and amounts charged can be eliminated.

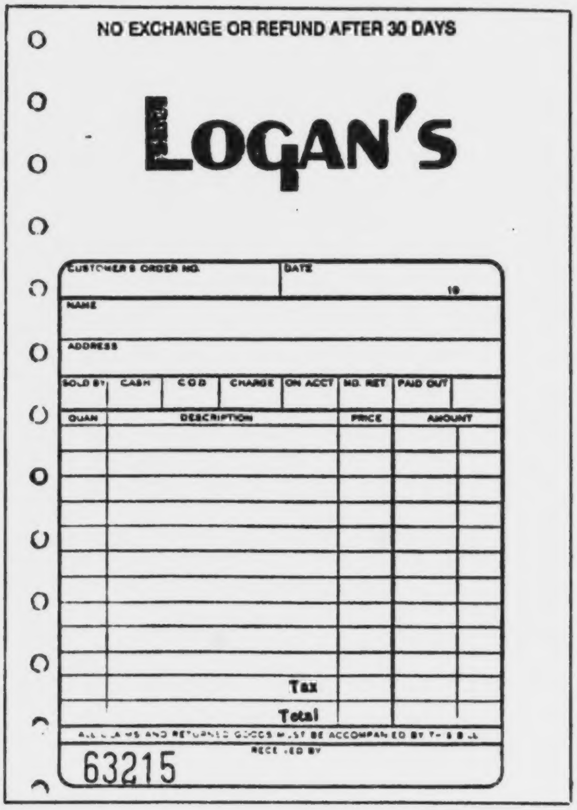
TEST ITEM 048-00-11

INSTRUCTIONS TO STUDENTS: Using the information provided in the sales situation, complete the sales check below.

SALES SITUATION: You are Clerk 34. You have just made a successful sale to Mr. Pete Nolan, 385 River Street, Lenoir, NC 28645. He is paying cash for the following items:

Dept. #1: 2 shirts, \$3 and \$4
Dept. #2: 2 belts, \$3.50 and \$3
Dept. #3: 2 pair of pants, \$10 and \$8

Tax rate is 4%.



NO EXCHANGE OR REFUND AFTER 30 DAYS

LOGAN'S

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| CUSTOMER'S ORDER NO. | | | | DATE 19 | | | |
| NAME | | | | | | | |
| ADDRESS | | | | | | | |
| SOLD BY | CASH | C O D | CHARGE | ON ACCT | MD. RET | PAID OUT | |

| QUAN | DESCRIPTION | PRICE | AMOUNT |
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| | Tax | | |
| | Total | | |

ALL CLAIMS AND RETURNED GOODS MUST BE ACCOMPANIED BY THIS BILL

63215 RECEIVED BY

COMPETENCY 049: Process layaways.

TEST ITEM 049-00-11

INSTRUCTIONS TO STUDENTS: Read each of the following statements about layaways. Determine if each statement is true or false. Write the correct response (true or false) in the blank to the left of each statement.

____ 1. When a customer uses layaway, he/she pays a lower interest rate than on a regular charge account.

____ 2. When an item is placed in layaway, it is important that a pick-up date be established.

____ 3. Offering layaway service to its customers helps to build goodwill for the store.

____ 4. When an item is purchased on layaway, it is identified with a layaway ticket and remains with regular stock until the account is paid.

____ 5. When writing a layaway sales check, the deposit percentage is added to the merchandise total.

TEST ITEM 049-00-12

See Test Item 046-00-13.

TEST ITEM 049-00-13

**INSTRUCTIONS TO STUDENTS**: Read the case problem below involving a layaway transaction. Fill in the sales check for the amount of the layaway deposit and complete the layaway ticket.

CASE PROBLEM: On January 14, Mrs. Jane Cole of 920 Lee Street, Wilkesboro, NC 28697, (phone number 667-7777) puts a knit suit priced at $49.99 on layaway at Logan's. Clerk #509 accepts her deposit of $20 (for purchase from Dept. 995-J2) and informs her of the store's policy regarding layaway sales: Items must be picked up within 45 days from date of layaway; to hold the layaway without a service charge, two minimum payments of $3 must be made before the end of 45 days; no refunds or exchanges will be granted after 45 days. State sales tax is 4%.

**DATE:** ____________

**NAME:** ____________

**ADDRESS:** ____________

| | | | | | |
|---|---|---|---|---|---|
| **CLERK #** | **CASH** | **COD** | **CHRG.** | **DEPT.** | **J4165** |
| **Quantity** | **DESCRIPTION** | | | | **Price** |
| | | | | | |

| | | |
|---|---|---|
| **Instructions:** | **Subtotal** | |
| | **Tax** | |
| | **Total** | |

TEST ITEM 049-00-13 (Continued)

| | | | |
|---|---|---|---|
| Clerk # | DATE / / <br> J9467-52-8 | | TOTAL SALE |
| DEPT. | QUANTITY | ARTICLE | PRICE |
| | | | |
| | | Sub-T. | |
| HOLD UNTIL: | | SAles Tax | |
| | | Total | |
| | | Less Deposit | |
| | | Balance | |
| | | | |

NAME:

ADDRESS:

| | |
|---|---|
| Phone: | Purchaser's Signature |

| | | |
|---|---|---|
| Hold Until: / / | J9467-52-8 | Amount Due |

NAME

ADDRESS

PHONE:

| | |
|---|---|
| Attach this Stub to Merchandise | Clerk No. |
| | |

**COMPETENCY 050**: Make refunds or exchanges on return merchandise in accordance with company policy.

TEST ITEM 050-00-11

**INSTRUCTIONS TO STUDENTS**: Read each of the following statements about refunds and exchanges. Determine if each statement is true or false. Write the correct response (true or false) in the blank to the left of each statement.

____ 1. Allowing customers to take merchandise out on approval may result in a higher percentage of returned goods.

____ 2. Store personnel have nothing to do with causing merchandise returns.

____ 3. In handling refunds or exchanges, the salesperson should do whatever the customer requests.

____ 4. Cash refunds are not given for merchandise if it was paid for by check.

____ 5. Most stores avoid case refunds on gift items if possible.

TEST ITEM 050-00-12

**INSTRUCTIONS TO STUDENTS**: In Column I are definitions of terms related to refunds or exchanges. From the terms in Column II, select the one which is most appropriate for each definition in Column I. Record the letter of your choice in the space provided to the left.

Column I

____ 1. Price of returned merchandise is same as price of newly selected merchandise

____ 2. A certificate or form that can be used instead of cash to purchase other merchandise in the store

____ 3. Store returns amount paid for an item to the customer

____ 4. Settlement of customer complaint about merchandise

____ 5. Price of returned merchandise is not the same as price of newly selected merchandise

____ 6. Customer's charge account is credited for amount of merchandise being returned

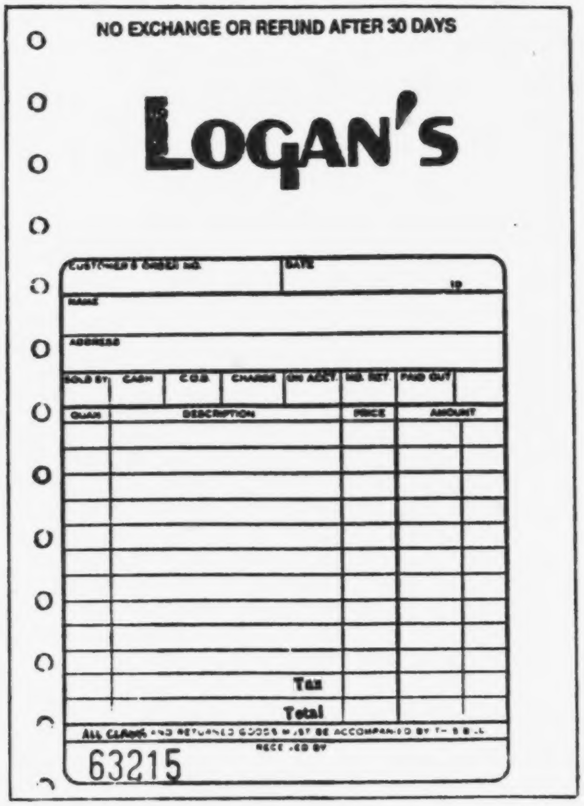
Column II

A. Adjustment
B. Cash refund
C. Credit refund
D. Due bill
E. Even exchange
F. Partial allowance
G. Uneven exchange

TEST ITEM 050-00-13

INSTRUCTIONS TO STUDENTS: Read the following case problem involving an exchange of merchandise. Complete the form below based on the information given in the case using the single-sales-form method of recording the exchange.

CASE PROBLEM: A regular customer, Martha Robertson (108 Lincoln Place, North Wilkesboro, NC), has returned a belt she purchased 12 days ago for $6.99 cash. She complained that an eyelet came out the first time she wore it. She has her sales check to verify the date of purchase. Martha has selected a new belt priced at $7.50. Sales tax rate is 4%. As Clerk #26, complete the following sales check to make the exchange.



NO EXCHANGE OR REFUND AFTER 30 DAYS

LOGAN'S

| | |
|---|---|
| CUSTOMER'S ORDER NO. | DATE 19 |
| NAME | |
| ADDRESS | |

| SOLD BY | CASH | C.O.D. | CHARGE | ON ACCT. | MD. RET. | PAID OUT | |
|---|---|---|---|---|---|---|---|
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| QUAN | DESCRIPTION | PRICE | AMOUNT |
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| | Tax | | |
| | Total | | |

ALL CLAIMS AND RETURNED GOODS MUST BE ACCOMPANIED BY THIS BILL

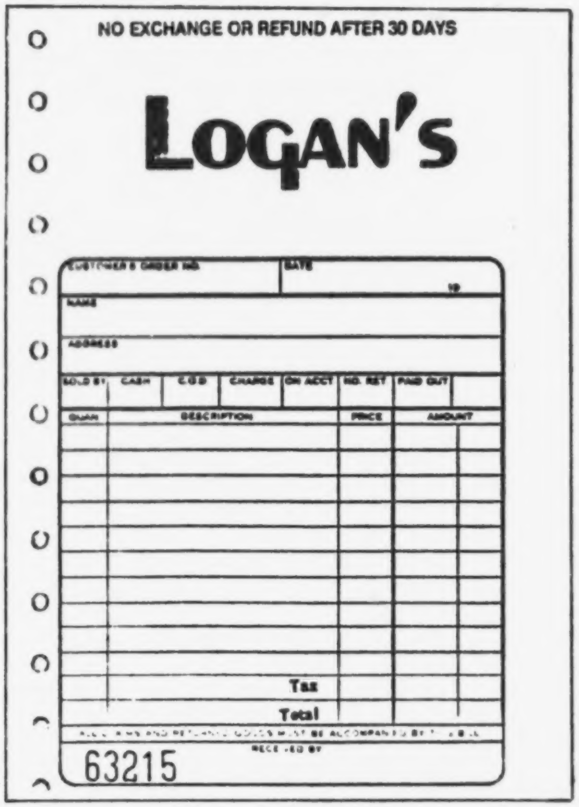
63215 RECEIVED BY

**COMPETENCY 051**: Write gift certificates and special orders.

TEST ITEM 051-00-11

**INSTRUCTIONS TO STUDENTS**: Read the following case problem. Based on the information contained in the case, complete the sales check and write the accompanying gift certificate.

CASE PROBLEM: You are working as employee 26 in the Lingerie Department (Dept. 3) of Logan's. Mrs. Kathryn Walsh, a regular customer, wants to purchase a $50 gift certificate for her daughter-in-law's birthday. Her daughter-in-law's name and address is: Joni Walsh, 501 Hampton Street, Elkin, NC 28621. Your customer's address is Route 2, Box 223-A, Wilkesboro, NC 28697.



NO EXCHANGE OR REFUND AFTER 30 DAYS

LOGAN'S

CUSTOMER'S ORDER NO. | DATE 19

NAME

ADDRESS

| SOLD BY | CASH | C.O.D. | CHARGE | ON ACCT | MD. RET | PAID OUT |
|---|---|---|---|---|---|---|
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| QUAN | DESCRIPTION | PRICE | AMOUNT |
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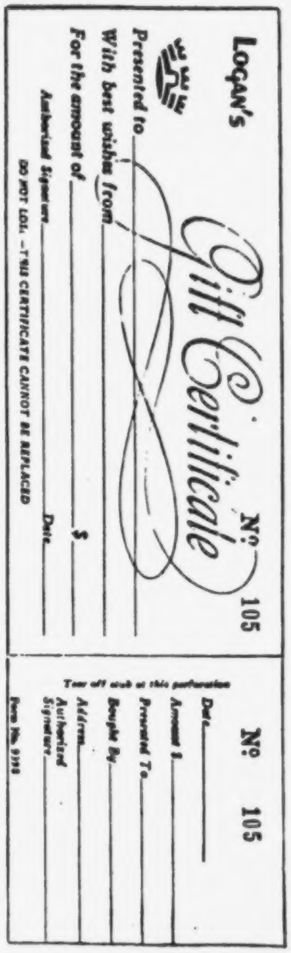
| | Total | | |

ALL CLAIMS AND RETURNED GOODS MUST BE ACCOMPANIED BY THIS BILL

RECEIVED BY

63215



LOGAN'S

Gift Certificate

Nº 105

Presented to

With best wishes from

For the amount of $

Authorized Signature

Date

DO NOT LOSE — THIS CERTIFICATE CANNOT BE REPLACED

Tear off stub at this perforation

Nº 105

Date

Amount $

Presented To

Bought By

Address

Authorized Signature

Form No. [illegible]

**COMPETENCY 052:** Sell merchandise over the telephone.

TEST ITEM 052-00-11

**INSTRUCTIONS TO STUDENTS:** Read each of the following statements about telephone selling. Determine if each statement is true or false. Write the correct response (true or false) in the blank to the left of each statement.

____ 1. The purpose of telephone selling is to sell to customers who are unable to come into the store.

____ 2. It is important to immediately identify yourself when using telephone selling.

____ 3. A salesperson may pick up the telephone at any time and expect to make a successful sale if he/she listens attentively.

____ 4. An attention-getting approach is vitally important since the customer cannot see the merchandise displays, salesperson, etc.

____ 5. In telephone selling, desire may be created by asking positive questions to help the customer establish a need.

TEST ITEM 052-00-12

**INSTRUCTIONS TO STUDENTS:** Read each of the following incomplete sentences. Determine which of the possible completion choices is most appropriate for each statement. Write the letter of this response in the space provided to the left.

____ 1. If a customer requests information that is not readily available:

A. Ask him/her to hold until you find the information.
B. Ask the customer to call you back at a specific time.
C. Get his/her name and number and call back as soon as you find the information.
D. Tell the customer you will find the information when you have time.

____ 2. A good telephone personality does not require:

A. A well-groomed appearance.
B. Showing interest in others.
C. Sincerity and helpfulness.
D. The use of empathy and/or sympathy.

____ 3. Because the customer cannot see or handle the merchandise presented in telephone selling:

A. Good quality, fairly priced merchandise should be selected.
B. Low quality merchandise should be selected.
C. Only the best quality, highest priced merchandise should be selected.
D. Quality and price make no real difference.

____ 4. Introducing yourself and referring to a regular customer's upcoming anniversary is an example of a:

A. Service approach.
B. Special-occasion approach.
C. Special sale or bargain approach.
D. Thank-you approach.

____ 5. Customer desire for merchandise in telephone selling can be created by:

A. Asking for delivery instructions.
B. Listening for buying signals.
C. Promptly introducing yourself, your store, and stating your reason for calling.
D. Using words that help the customer visualize the merchandise.

TEST ITEM 052-00-13

INSTRUCTIONS TO STUDENTS: Read and analyze the following telephone selling situation to identify the salesperson's mistakes. Suggest a more suitable opening and closing statement.

Linda Walker is employed as a salesperson in the Teen's Department at Logan's. She is busy writing in her salesbook when the telephone rings. The phone rings six times, then obviously irritated, she answers:

Salesperson: "Hello."
Customer: "Is this the Teen's Department?"
Salesperson: "Yeah."
Customer: "I would like to ask about the hand-crocheted gloves that were advertised in Thursday's Daily Journal . . .
Salesperson: (Interrupts customer) "What color?"
Customer: "I am interested in pale green or . . .
Salesperson: (Interrupts customer) "They only come in pink or blue, just like the paper stated."
Customer: "What shade of blue--is it bright?"
Salesperson: "Yeah, it's pretty bright. What size?"
Customer: "My daughter is thirteen and has a short chubby hand. Do you think a medium size would be large enough?"
Salesperson: "I don't know if we have blue left in medium. They're on another counter. I'll have to look." (Lays receiver down heavily on counter. Noise resounds through receiver. Salesperson gets gloves, stops to talk with a fellow employee, and returns.) "Yes, I have a medium in blue. Do you want them sent out?"
Customer: "Yes, would you send them C.O.D., please?
Salesperson: "You have to pay 50 cents on a C.O.D. What's the name and address?
Customer: "Mrs. David Brown, 302 Winston Place, Wilkesboro."
Salesperson: "Okay, dear." (Hangs up and repeats address to herself.) "Let's see, that was 203 Winston Street."

1. Identify at least five mistakes the salesperson made in this telephone sale.

2. Write an acceptable greeting for this sales situation.

3. If the salesperson had assured the customer that a medium would fit and that the size and color gloves are available, suggest a more suitable closing statement.

**COMPETENCY 053**: Sell to customers in a self-service store while performing regular storekeeping duties.

TEST ITEM 053-00-11

INSTRUCTIONS TO STUDENTS: Read each of the following incomplete sentences. Determine which of the possible completion choices is most appropriate for each statement. Write the letter of this response in the space provided to the left.

____ 1. Selling duties of a self-service salesperson include:

A. Explaining merchandise.
B. Marking merchandise.
C. Preparing displays.
D. Stocking shelves.

____ 2. When a customer asks the location of specific merchandise, the self-service salesperson should:

A. Direct the customer to the merchandise.
B. Go get the merchandise for the customer.
C. Have someone else bring the merchandise to the customer,
D. Lead the customer to the merchandise.

____ 3. When you see a customer with arms full of merchandise, the self-service salesperson should:

A. Ask, "May I help you?"
B. Carry the merchandise to the checkout.
C. Ignore the customer.
D. Offer a shopping cart or basket.

____ 4. A salesperson has just helped a customer locate a requested item. His/her next step should be to:

A. Accept payment for the selected merchandise.
B. Go with the customer to the checkout counter.
C. Return to what he/she was doing when the customer approached.
D. Suggest related merchandise or merchandise in another department.

____ 5. A self-service salesperson is stocking and notices a customer looking at a rack display of wool shirts and obviously in need of assistance. The most suitable approach would be:

A. "Are you finding what you need?"
B. "Do you want some help?"
C. "May I help you?"
D. "Nice day, isn't it?"

COMPETENCY 054: Work with more than one customer simultaneously in a courteous manner.

TEST ITEM 054-00-11

INSTRUCTIONS TO STUDENTS: Read each of the following incomplete sentences. Determine which of the possible completion choices is most appropriate for each statement. Write the letter of this response in the space provided to the left.

____ 1. When a second customer approaches just as the first customer is about ready to buy and requires your full attention, you should:

A. Glance and nod at the second customer and continue the first sale.
B. Greet the second customer and assure him/her you will wait on him/her in a minute.
C. Leave the first customer abruptly and take care of the second.
D. Pretend you did not see the second customer come in.

____ 2. When a second customer approaches while your first customer still needs attention but is not ready to buy, you should:

A. Glance and nod at the second customer and continue the first sale.
B. Greet the second customer and assure him/her you will wait on him/her in a minute.
C. Leave the first customer abruptly and take care of the second.
D. Pretend you did not see the second customer come in.

____ 3. When a second customer approaches while the first customer is in the early stages of the buying decision and does not require your full attention, you should:

A. Excuse yourself momentarily from the first and greet the second to determine his/her needs.
B. Glance and nod at the second customer and continue the first sale.
C. Greet the second customer and assure him/her you will wait on him/her in a minute.
D. Leave the first customer abruptly and take care of the second.

____ 4. When you are working with a customer and another customer enters your department, you should greet the customer with:

A. A merchandise approach.
B. An acknowledgement approach.
C. A personal approach.
D. A service approach.

____ 5. The way you handle the approach of a second customer depends on:

A. Personal feelings toward the two customers.
B. The amount of the merchandise being considered by the first.
C. The buying stage the first customer has reached.
D. The social and economic status of the two customers.

028-00-11

These numbers should be checked: 5, 6, 8, 9, 10 11, 12, 16, 17, 19, 20

029-00-11

1. False
2. True
3. False
4. True

030-00-11

1. The "approach" is the opening of the sale. It should be the most important part of the entire selling process because the salesperson must create a favorable first impression and set the stage for the success or failure of the selling presentation.
2. a. Interest in the customer
   b. Promptness in serving the customer
   c. Self-confidence in the salesperson's ability

030-00-12

1. B
2. B
3. A
4. C

Answers will vary for reasons for selections. It should be left to the judgment of the teacher as to whether the student has satisfactorily explained the reason for the choice.

030-00-13

Case Problem 1: 1. Continue to watch your customer; as soon as she returns to the dress, you would approach her.
2. Merchandise approach

Case Problem 2: 1. As soon as you notice the customer starting to leave
2. Service approach

030-00-14

(Possible answers)
1. Try to make Mrs. Jones feel welcome and that you want to help her. Be enthusiastic and be sure you use an appropriate opening statement.
2. Listen and question to determine exactly what style of slacks she wants.
3. Show her a variety of patterns, colors, and prices. You could eliminate those she objects to.
4. Ask questions to narrow the selection that you need to show her. Then watch her expressions or listen to her comments to eliminate some of the choices. The key to closing is to observe and listen and close at the first opportunity.

030-00-15

To receive credit for successfully completing the following test items, the student should achieve at least an average rating on the sections indicated below:

| TEST ITEM | SECTION OF DEMONSTRATION |
|---|---|
| 028-00-12 | Approach |
| 028-00-15 | Approach |
| 033-00-12 | Product Presentation |
| 034-00-13 | Product Presentation |
| 038-00-13 | Handling Objections |
| 039-00-13 | Handling Objections |
| 040-00-14 | Close |
| 041-00-13 | Close |
| 042-00-13 | Suggestion Selling |

031-00-11

1. D, H, I
2. F, H
3. H, I
4. A, C
5. A, C

031-00-12

(Possible Answers)
Interested in new clothes for work--Listening
Type of clothing (dress, suit, pant suit)--Questioning
Style of clothing (A-line, pleats, etc.)--Observing and Listening
Permanent press (stays neat)--Listening and questioning
Size--Observing and questioning
Color Preference--Observing and questioning
Print/pattern/plain preference--Questioning
Versatility (can be interchanged with other items)--Listening and questioning
Medium price (first paycheck)--Listening and questioning

031-00-13

See Key for Test Item 030-00-14.

032-00-11

1. False
2. True
3. True
4. False
5. True

033-00-11

1. True
2. True
3. True
4. False
5. True

033-00-12

See Key for Test Item 030-00-14.

033-00-13

See Key for Test Item 030-00-15.

034-00-11

1. D
2. B
3. B
4. C
5. C

034-00-12

1. Sight or touch
2. (1) Handing the shirt to Mr. Day
   (2) Letting him try the shirt on
3. It increases interest and builds desire in the merchandise--or--It develops a feeling of ownership within the customer.

034-00-13

See Key for Test Item 030-00-15.

035-00-11

1. D
2. D
3. B
4. A
5. D

036-00-11

1. C
2. This would fit her need for color and the scarf could possibly fill the need for the tie feature.

036-00-12

1. A
2. B
3. A

036-00-13

2
4
3
1

**037-00-11**

1. False
2. True
3. True
4. False
5. True

**038-00-11**

1. True
2. False
3. True
4. True
5. True

**038-00-12**

1. D
2. C
3. E
4. A
5. G
6. B

**038-00-13**

See Key for Test Item 030-00-15.

**039-00-11**

1. D
2. C
3. A
4. B
5. D

**039-00-12**

See Key for Test Item 030-00-14.

**039-00-13**

See Key for Test Item 030-00-15.

**040-00-11**

1, 2, 4, 6, 7

**040-00-12**

1. True
2. False
3. True
4. False
5. False

**040-00-13**

See Key for Test Item 030-00-14.

**040-00-14**

See Key for Test Item 030-00-15.

**041-00-11**

1. True
2. False
3. True
4. False
5. False

**041-00-12**

1, 4, 5

**041-00-13**

See Key for Test Item 030-00-15.

**042-00-11**

1. True
2. False
3. True
4. False
5. True
6. False
7. True
8. True

**042-00-12**

1. A
2. D
3. C
4. B
5. A
6. B

**042-00-13**

See Key for Test Item 030-00-15.

**043-00-11**

1. True
2. False
3. False
4. True
5. True

**043-00-12**

2, 3, 5

**043-00-13**

1. A
2. D
3. A
4. A
5. D

**044-00-11**

3, 4, 5, 7, 8, 10

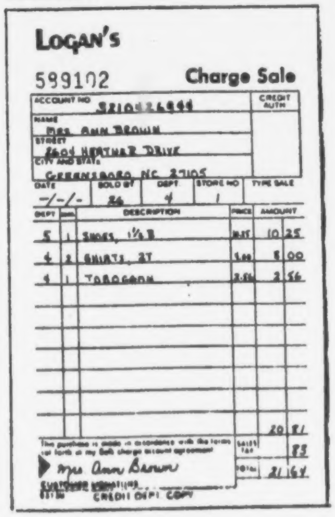
**045-00-11**

1. D
2. C
3. B
4. A
5. F
6. E

**045-00-12**

6, 1, 2, 7, 5, 10, 4, 3, 8, 9

**045-00-13**



**LOGAN'S**

599102 **Charge Sale**

ACCOUNT NO
CREDIT AUTH
NAME Mrs. Ann Brown
STREET 2604 Heather Drive
CITY AND STATE Greensboro NC 27105

| DATE | SOLD BY | DEPT | STORE NO | TYPE SALE |
|---|---|---|---|---|
| -/-/- | 26 | 4 | 1 | |

| DEPT | QTY | DESCRIPTION | PRICE | AMOUNT | |
|---|---|---|---|---|---|
| 5 | 1 | Shoes, 1½ B | 10.25 | 10 | 25 |
| 4 | 2 | Shirts, 2T | 4.00 | 8 | 00 |
| 4 | 1 | Toboggan | 2.56 | 2 | 56 |
| | | | | 20 | 81 |
| | | | SALES TAX | | 83 |
| | | | TOTAL | 21 | 64 |

This purchase is made in accordance with the terms set forth in my Belk charge account agreement

Mrs Ann Brown
CUSTOMER SIGNATURE
CREDIT DEPT COPY

**046-00-11**

1. D
2. A
3. B
4. B
5. C

**046-00-12**

| | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1. | | 25.96 | 2. | | 19.25 | 3. | | 2.29 | 4. | | 4.99 | 5. | | 13.98 |
| | | 4.99 | | | 25.95 | | | 3.49 | | | 9.98 | | | 12.98 |
| | | 2.29 | | | 2.38 | | | 4.46 | | | 6.79 | | | 19.98 |
| | ST | 33.24 | | ST | 47.58 | | ST | 10.24 | | | 8.58 | | | 6.79 |
| | Tax | 1.33 | | Tax | 1.90 | | Tax | .31 | | ST | 30.34 | | | 6.99 |
| | T | 34.57 | | T | 49.48 | | T | 10.55 | | Tax | 1.52 | | ST | 60.72 |
| | | | | | | | | | | T | 31.86 | | Tax | 2.13 |
| | | | | | | | | | | | | | T | 62.85 |

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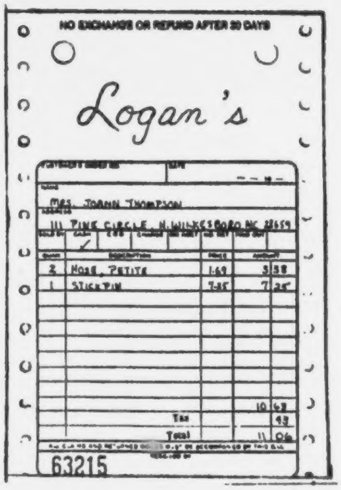
046-00-13


NO EXCHANGE OR REFUND AFTER 30 DAYS

Logan's

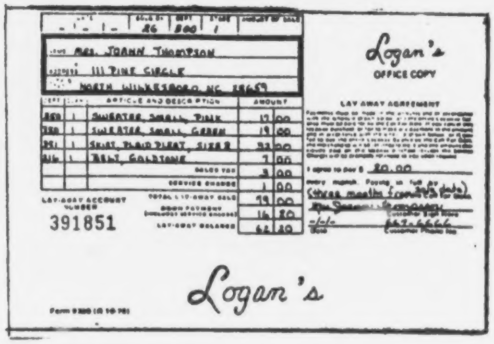
MRS. JOANN THOMPSON

111 PINE CIRCLE, N. WILKESBORO NC 28659

✓

| | | | |
|---|---|---|---|
| 2 | HOSE, PETITE | 1.69 | 3.38 |
| 1 | STICKPIN | 7.25 | 7.25 |
| | | | 10.63 |
| | Tax | | .43 |
| | Total | | 11.06 |

63215


-/-/- 26 800 1

MRS. JOANN THOMPSON

111 PINE CIRCLE

NORTH WILKESBORO NC 28659

| | | ARTICLE AND DESCRIPTION | AMOUNT |
|---|---|---|---|
| 860 | 1 | SWEATER, SMALL, PINK | 17.00 |
| 780 | 1 | SWEATER, SMALL, GREEN | 19.00 |
| 351 | 1 | SKIRT, PLAID PLEAT, SIZE 8 | 32.00 |
| 216 | 1 | BELT, GOLDTONE | 7.00 |
| | | SALES TAX | 3.00 |
| | | SERVICE CHARGE | 1.00 |
| | | TOTAL LAY-AWAY SALE | 79.00 |
| | | DOWN PAYMENT (INCLUDES SERVICE CHARGE) | 16.80 |
| | | LAY-AWAY BALANCE | 62.20 |

LAY-AWAY ACCOUNT NUMBER
391851

Logan's
OFFICE COPY

LAY AWAY AGREEMENT

I agree to pay $ 20.00 every month. Paying in full by (three months from sale date)

Mrs. Joann Thompson
Customer Signature

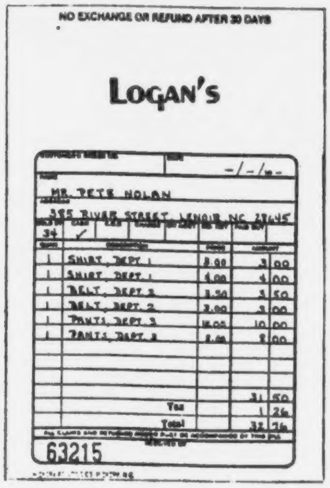
-/-/-
Date

667-6666
Customer Phone No.

Logan's

048-00-11

In evaluating this test item emphasis should be placed on legibility as well as accuracy.


NO EXCHANGE OR REFUND AFTER 30 DAYS

LOGAN'S

-/-/-

MR. PETE NOLAN

355 RIVER STREET, LENOIR NC 28645

34 ✓

| | | | |
|---|---|---|---|
| 1 | SHIRT, DEPT. 1 | 3.00 | 3.00 |
| 1 | SHIRT, DEPT. 1 | 4.00 | 4.00 |
| 1 | BELT, DEPT. 2 | 3.50 | 3.50 |
| 1 | BELT, DEPT. 2 | 3.00 | 3.00 |
| 1 | PANTS, DEPT. 3 | 10.00 | 10.00 |
| 1 | PANTS, DEPT. 3 | 8.00 | 8.00 |
| | | | 31.50 |
| | Tax | | 1.26 |
| | Total | | 32.76 |

63215

047-00-11

1. 23.94
4.95
2.19
ST 31.08
D -3.11
Tax 1.12
T 29.09

2. 21.95
27.95
ST 49.90
Tax 1.75
S.C. 1.00
Dep. -9.98
Bal. 42.67

3. 4.19
4.59
7.00
ST 15.78
D -1.93
Tax .42
T 14.27

4. 94.00
12.50
9.00
Alt. 2.00
ST 117.50
Tax 5.88
T 123.38

5. 29.95
19.95
ST 49.90
Tax 2.50
Del. 1.96
T 54.36

047-00-12

1. B
2. D
3. A
4. C
5. D

047-00-13

See Key for Test Item 046-00-13.

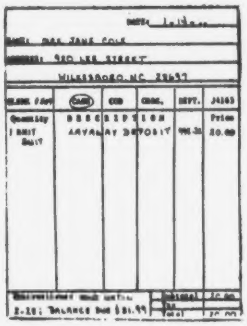
049-00-11

1. False
2. True
3. True
4. False
5. False

049-00-12

See Key for Test Item 046-00-13.

049-00-13


DATE: 1-14-..

NAME: MRS. JANE COLE

ADDRESS: 920 LEE STREET

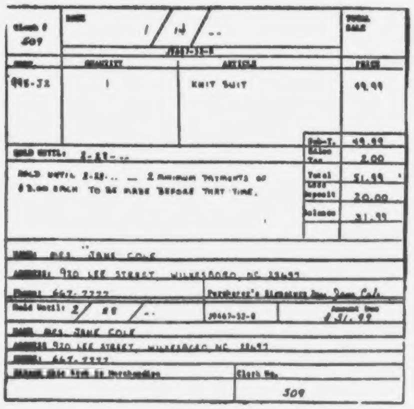
WILKESBORO, NC 28697

CASH ○ COD CHG. DEPT.

| Quantity | DESCRIPTION | DEPT. | Price |
|---|---|---|---|
| 1 KNIT SUIT | LAYAWAY DEPOSIT | 998-32 | 20.00 |

2-28; BALANCE DUE $31.99

Subtotal 20.00
Total 20.00


Clerk # 509

DATE 1/14/..

| DEPT. | QUANTITY | ARTICLE | PRICE |
|---|---|---|---|
| 998-32 | 1 | KNIT SUIT | 49.99 |

HOLD UNTIL: 2-28-..

HOLD UNTIL 2-28-.. — 2 MINIMUM PAYMENTS OF $3.00 EACH TO BE MADE BEFORE THAT TIME.

| | |
|---|---|
| Sub-T. | 49.99 |
| Sales Tax | 2.00 |
| Total | 51.99 |
| Less Deposit | 20.00 |
| Balance | 31.99 |

NAME: MRS. JANE COLE

ADDRESS: 920 LEE STREET, WILKESBORO, NC 28697

PHONE: 667-7777

Purchaser's Signature Mrs. Jane Cole

Hold Until: 2/28/..

Amount Due $31.99

NAME MRS. JANE COLE

ADDRESS 920 LEE STREET, WILKESBORO NC 28697

PHONE: 667-7777

Clerk No. 509

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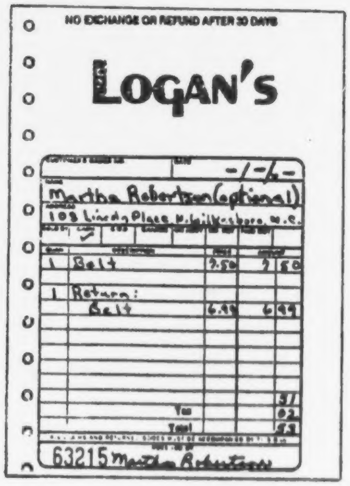
050-00-11

1. True
2. False
3. False
4. False
5. True

050-00-12

1. E
2. D
3. B
4. A
5. G
6. C

050-00-13



NO EXCHANGE OR REFUND AFTER 30 DAYS

LOGAN'S

-/-/-

Martha Robertson (optional)

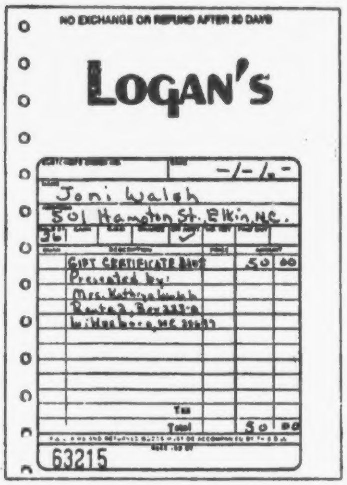
103 Linda Place N. Wilkesboro, N.C.

✓

| | | | | |
|---|---|---|---|---|
| 1 | Belt | 7.50 | 7 | 50 |
| 1 | Return: | | | |
| | Belt | 6.99 | 6 | 99 |
| | | | | 51 |
| | Tax | | | 02 |
| | Total | | | 53 |

63215 Martha Robertson

051-00-11



NO EXCHANGE OR REFUND AFTER 30 DAYS

LOGAN'S

-/-/-

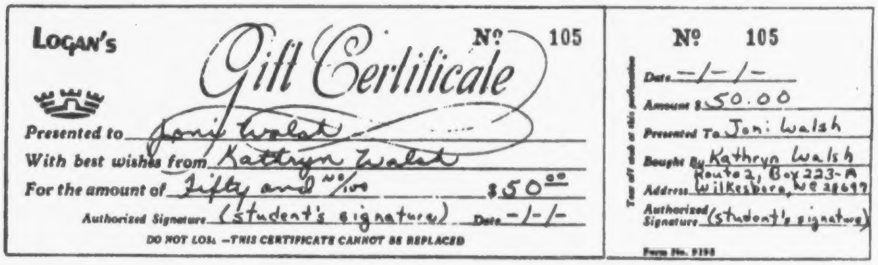
Joni Walsh

501 Hampton St. Elkin, N.C.

36 ✓

| | | | | |
|---|---|---|---|---|
| | Gift Certificate No5 | | 50 | 00 |
| | Presented by: | | | |
| | Mrs. Kathryn Walsh | | | |
| | Route 2, Box 223-A | | | |
| | Wilkesboro, NC 28697 | | | |
| | Tax | | | |
| | Total | | 50 | 00 |

63215



LOGAN'S

Gift Certificate

Nº 105

Presented to Joni Walsh

With best wishes from Kathryn Walsh

For the amount of Fifty and no/100 $50.00

Authorized Signature (student's signature) Date -/-/-

DO NOT LOSE—THIS CERTIFICATE CANNOT BE REPLACED

Nº 105

Date -/-/-

Amount $ 50.00

Presented To Joni Walsh

Bought By Kathryn Walsh

Address Route 2, Box 223-A Wilkesboro, NC 28697

Authorized Signature (student's signature)

052-00-11

1. False
2. True
3. False
4. True
5. True

052-00-12

1. C
2. A
3. A
4. B
5. D

052-00-13

1. (At least five of these or other acceptable possibilities)
   - (1) Did not answer promptly
   - (2) Did not identify herself or department
   - (3) Interrupted customer
   - (4) Lacked sufficient merchandise knowledge
   - (5) Was not courteous
   - (6) Layed receiver down noisily
   - (7) Called customer "dear"
   - (8) Left customer holding longer than necessary
   - (9) Did not write information down
2. Example: "Good morning, Linda Walker, Children's Department."
3. Suggestion: "I'm sure your daughter will enjoy these gloves. Would you like to have them added to your account?" (or delivered--**or held for you, etc.**)

053-00-11

1. A
2. A
3. D
4. D
5. A

054-00-11

1. A
2. B
3. A
4. B
5. C

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# PRINTED REFERENCES

## PRINTED REFERENCES FOR PERSONAL SELLING

TEXT:

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CONSORTIUM AND CURRICULUM LAB MATERIALS.

IDECC. The Ohio State University, 1564 West First Avenue, Columbus, Ohio 43212. PR-9

PAMPHLETS AND BROCHURES:

Killian, Ray A. "Tips to the Top in Retail Selling." Charlotte: Belk and Leggett, 1976. PR-10

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SIMULATIONS:

Koeninger, Jimmy G. and Thomas A. Hyshner. Jeffrey's Department Store--A Retailing Simulation. New York: McGraw-Hill Book Company, 1978. PR-12

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## FOR
## MERCHANDISING OPERATIONS

I. Broad Content Outline, Competencies, and Objectives. . . . . . 1

II. Detailed Content . . . . . . . . . . . . . . . . . . . . . . . . 5

III. Student Activities . . . . . . . . . . . . . . . . . . . . . . . 15

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Marketing and Distributive Education

Fashion Merchandising - 7271
Fashion Merchandising and Management - 7272

| COMPETENCY STATEMENT | 7271 | C | S | CO |
|---|---|---|---|---|
| I. Stockkeeping | | | | |
| A. The Importance of efficient stockkeeping | | | | |
| B. Location of stock within the store or department | | | | |
| 055 Locate stock on the selling floor and in understock or reserve stock.<br>The student will describe various locations of stock. | X | | | X |
| C. Arrangement of fashion merchandise in forward or reserve stock | | | | |
| 056 Sort merchandise by department, size, color and styles where appropriate.<br>The student will sort items of merchandise by department, subclassification, color and size according to specified store policy. | X | | | X |
| 057 Stock merchandise in appropriate place and appropriate manner.<br>The student will arrange specified items of newly arrived, older and clearance fashion merchandise on a floor plan according to specified store policy. | X | | | X |
| D. Regular stockkeeping duties | | | | |
| 058 Identify the necessary stockkeeping and housekeeping duties as they relate to proper stock care.<br>The student will identify stockkeeping duties regularly performed in most apparel and accessories stores. | X | X | | |
| 059 Keep customer want slips as told by manager.<br>The student will fill out each part of a specified want slip. | X | | | X |
| 060 Advise buyer of merchandise needs.<br>Given a basic stock list and an inventory of merchandise currently on-hand, the student will list on a stock requisition form, the amount of the specified merchandise that needs to be ordered. | X | | | X |
| E. Housekeeping duties<br>The student will identify daily and weekly housekeeping duties regularly performed in most apparel and accessories stores. | | | | |
| F. Closing procedures | | | | |
| 061 Identify the necessary steps in closing out the department at the end of a selling day.<br>The student will identify the steps taken in closing a department at the end of a selling day. | X | | | X |
| II. Receiving and checking the merchandise | | | | |
| A. Importance of proper receiving and checking | | | | |
| B. Origin of most apparel items | | | | |
| C. Carriers most often used | | | | |
| D. Forms | | | | |
| 062 Review for accuracy and complete, if necessary, receiving records such as freight ticket, packing slip and invoice.<br>Given a specified receiving record form, freight bill, invoice and purchase order, the student will fill in each part of the receiving record. | X | X | | |

| COMPETENCY STATEMENT | 7271 | C | S | CO |
|---|---|---|---|---|
| E. Checking merchandise | | | | |
| 063 Check merchandise for completeness of order and condition of items. | X | X | | |
| The student will identify the checks made by stores when receiving merchandise. | | | | |
| Given a specified invoice, purchase order, and a specific list of merchandise received and counted, the student will check the invoice as required for checking-in merchandise received. | | | | |
| F. Procedures for handling non-delivered or lost merchandise | | | | |
| 064 Follow through on non-delivered or lost merchandise. | X | | | X |
| In a simulation, the student will complete all parts of a receiving exception report. | | | | |
| III. Procedure for handling defective/damaged merchandise | | | | |
| A. Reasons for defective/damaged merchandise | | | | |
| B. Methods of handling | | | | |
| 065 Follow correct procedures in handling defective/damaged merchandise. | X | X | | |
| The student will identify the alternatives for handling defective/damaged merchandise. | | | | |
| C. Forms | | | | |
| The student will identify forms used in handling defective/damaged merchandise. | | | | |
| Given specified forms, store policy and specified defective or damaged items of apparel, the student will follow the correct procedures for handling the defective/damaged merchandise. | | | | |
| IV. Price tags | | | | |
| A. Common price tags | | | | |
| 066 Place price tags on the merchandise when necessary. | X | | | X |
| The student will place a plastic connector price tag on specified apparel items in such a way that the merchandise will not be damaged and the tag can be easily seen but not easily removed by the customer. | | | | |
| B. Information on price tags | | | | |
| C. Time of tagging | | | | |
| D. Sources of price tag information | | | | |
| E. Methods of marking | | | | |
| 067 Mark merchandise on selling floor where price tags have been removed or lost according to store policy. | X | | X | |
| The student will match the most appropriate kinds of price tags with specified apparel and accessory items. | | | | |
| The student will identify the appropriate locations for placing various kinds of price tags on merchandise. | | | | |
| The student will identify the type of information on a price tag, when price tags should be written, and the source of pricing information. | | | | |
| Given a store policy, pricing information on specific merchandise and the price tags, the student will place the necessary information on price tags. | | | | |

| COMPETENCY STATEMENT | 7271 | C | S | CO |
|---|---|---|---|---|
| F. Retail price changes | | | | |
| V. Cash register operations | | | | |
| A. Information necessary for cash register operation | | | | |
| 068 Operate cash register: itemize sales, ring total, add tax, change tapes, correct voids and take readings.<br>The student will identify the parts of a cash register and their functions.<br>After being given the specified procedure for changing the receipt and detail audit tapes on the cash register available, the student will change both tapes.<br>After being instructed in the proper procedure for operating the cash register available, the student will ring up the correct amount of a customer's purchase, add the tax, get the correct total sale and perform other functions specified by the instructor. | X | | X | |
| B. Procedure for opening the cash register | | | | |
| C. Procedure for making change | | | | |
| 069 Determine the correct change and count it back to a customer during a cash sale according to company procedure.<br>The student will be able to list in proper sequence, the eight steps in announcing the sale and returning the change to a customer.<br>Given the amount tendered and amount of the sale, the student will be able to determine and indicate by writing the correct change using as few coins and bills as possible.<br>During a simulated cash sale, the student will be able to determine manually, the correct change and follow in proper sequence the eight steps in announcing the sale and returning the change to the customer. | X | X | | |
| D. Procedure for correcting register errors | | | | |
| E. Procedure for closing out the cash register | | | | |
| 070 Balance cash drawer against register reading and complete appropriate forms for register close out.<br>The student will identify the type of information needed to complete a cash register close out report.<br>Given all required information, the student will close out a cash register and complete the appropriate forms. | X | X | | |
| VI. Checks, bank cards and credit cards | | | | |
| A. Customer checks | | | | |
| 071 Authorize customer checks according to the store's policy.<br>The student will label the parts of a check which must be inspected by a salesperson for authorization.<br>Given several customer checks, the student will identify those that are acceptable and state the reasons why the others are unacceptable. | X | X | | |
| 072 Examine credit cards and checks for bad credit or stolen cards.<br>The student will list the steps that should be taken in approving the use of a customer credit card. | X | X | | |

| COMPETENCY STATEMENT | 7271 | C | S | CO |
|---|---|---|---|---|
| B. Customer bank cards<br>The student will list appropriate steps that should be taken to insure that a bank card is not stolen. | | | | |
| C. Customer's store credit cards<br>Given a store policy, the student will approve/disapprove the use of a customer's store credit card. | | | | |
| VII. Inventory<br>A. Proper inventory procedures<br>B. Kinds of inventory<br>C. Inventory records<br>073 Conduct periodic stock counts for reordering of stock (unit control) and for annual inventory (dollar control).<br>Given price tickets and number of items of specific merchandise, and specific inventory counting sheets, the student will complete each part of the inventory counting sheet. | X | X | | |

PLANNING NOTES

## I. Stockkeeping

(SA-1)

A. The importance of efficient stockkeeping

1. To the customer

a. Desired merchandise is quick and easy to find.
b. Merchandise is kept in good condition.
c. Well-filled racks give a feeling of wide selection and a well-run store.

2. To the salespeople

a. Sales are easier to make because the merchandise is easy to find.
b. Returns are reduced because the right merchandise is originally bought.
c. Opportunity to learn more about the merchandise is provided.
d. Related items are grouped and facilitate multiple sales.

3. To management

a. Overall profits are increased by increasing sales and reducing costs.
b. Reduces soiled or damaged merchandise.
c. Indicates the speed of stockturn.
d. Builds customer goodwill.
e. Helps develop store image.

B. Location of stock within the store or department

(SA-2)
[CTIB 055-00-11]

1. Forward stock:

a. Is stock on the sales floor, available to the customers and salespeople.
b. Is best located for the majority of all fashion merchandise.
c. Includes merchandise on hanging racks, folded on shelves and counters or arranged on display.

2. Under stock:

a. Is stock in drawers or shelves located on the sales floor, but not accessible to customers.
b. Includes accessory items, cosmetics, and hosiery.
c. Is practical when the store fixtures have built-in storage space.
d. Facilitates getting needed items for the customer.

3. Reserve stock:

a. Is stock kept in a stockroom or in a warehouse.
b. Includes shoes, basic fashion items, and merchandise that arrives before the season.
c. Should be moved out of reserve stock as rapidly as possible.

C. Arrangement of fashion merchandise in forward or reserve stock

1. Stock is received and sorted.

a. In large stores receiving rooms or warehouses are used.
b. In small stores merchandise is often received on the sales floor itself.

2. Merchandise kept in reserve stock is often arranged by classification, size, color, vendor, and price.

(PR-2; p. 184)(PR-4; pp. 69-82)
[CTIB 055-00-12]

3. Stock is merchandised on the sales floor in order to promote multiple sales and present the image of the store or department.

(SA-3)
[CTIB 057-00-11]

a. The best placement of merchandise within a store or department is usually determined by:

(1) Store image;
(2) Customer buying habits;
(3) Time of year or season;
(4) Store size or layout.

b. Different types of merchandise are located in various areas of the store.

(1) In front area:

(a) Newest and most fashionable merchandise;
(b) Sales merchandise;
(c) Goods that the customer should know about.

(2) In middle or center area:

(a) Coordinated groupings that have been in stock for several weeks;
(b) New merchandise, not being featured.

(3) **In back area**:
  (a) **Basic items**,
  (b) **Men's suits**;
  (c) **Sale items**:
  (d) **Goods** that customers already know about.

(4) On **side walls**:
  (a) **Merchandise appropriate** for fixtures used.
  (b) Separates, dresses, bathing suits, jackets.

c. Constant rearrangement of merchandise within departments or areas is important.
  (1) **Keeps** new merchandise in front.
  (2) Puts different merchandise in prime traffic areas every few days.
  (3) Presents a "new look" to the regular customer.

d. Stock rotation brings older merchandise to the front or top of the stack. (PR-2; p. 184) (SA-4)(SA-5)
  (1) Used to prevent older merchandise from becoming shopworn and damaged.
  (2) Used only with basic merchandise.

D. Regular stockkeeping duties (HO-1) [CTIB 058-00-11]

1. Receive, check, mark and sort newly arrived merchandise.
2. Place or rearrange merchandise neatly on sales floor according to store policy.
3. Straighten racks (SA-6)(SA-7)
4. Straighten tables and bins.
5. Check price tickets and remark if necessary.
6. Check for damage. (HO-2)
7. Steam merchandise when necessary.
8. Rotate appropriate stock.
9. Guard against stock shrinkage.
10. Make out want slips. (HO-3)(SA-8)(SA-9) [CTIB 059-00-11]
  a. Used by some stores to indicate out-of-stock items.
  b. Useful to buyers and salespeople.
  c. Information provided includes:
    (1) Department or store;
    (2) Date;
    (3) Description of item requested;
    (4) Number of requests;
    (5) Stock that is getting low.
11. Advise buyer or manager of merchandise needs. (SA-10) or (SA-11)
  a. Turn in want slips.
  b. Check Basic Stock List: (PR-2, pp. 156-157) [CTIB 060-00-11]
    (1) Shows minimum amounts of basic items that should always be on hand.
    (2) Is based on average sales for a period.
    (3) Is used for items that are in constant demand.
    (4) Reorders are routine, notify buyer of what is below or near minimum.
  c. Check Model Stock Plan: (TM-1)(PR-2; p. 157)(SA-12)
    (1) Is used for fashion merchandise.
    (2) Is similar, but not as specific as the Basic Stock List.
    (3) Describes merchandise by class, sizes, and price lines.
    (4) Takes some of the guesswork out of buying.
    (5) Notify buyer when classifications are near minimums -- exception would be last of the season.
  d. Stay current on developing fashion trends and tell buyer what you feel will sell in your store.
  e. Notify buyer or manager by phone or in person, because fashion "needs" usually require immediate attention.
  f. Fill out Low Stock or Merchandise Requisition forms for recordkeeping purposes. (HO-4)

PLANNING NOTES

E. Housekeeping duties

[CTIB 058-00-12]

1. Daily responsibilities:
   - a. Dust all furniture, fixtures and ledges.
   - b. Clean mirrors and glass.
   - c. Sweep.
   - d. Vacuum.
   - e. Remove trash.
   - f. Polish chrome.
2. Weekly responsibilities:
   - a. Wash and water plants.
   - b. Wax rods.
   - c. Dust baseboards and dressing rooms.
   - d. Sweep and mop storage and office areas.
   - e. Clean bathrooms.

F. Closing Procedures:

(HO-5)
[CTIB 061-00-11]

1. Pick up trash left in store.
2. Check dressing rooms and put all merchandise found in forward stock.
3. Put "hold" merchandise in forward stock.
4. Wrap front racks if necessary.
5. Move all hangers not being used to storage area.
6. Straighten wrap stand.
   - a. Put out a supply of bags.
   - b. Check for proper supply of charge slips, sales tickets, other forms and pens.
   - c. Place lost items in lost and found.
   - d. Take all sensomatic tags removed from sold merchandise to the storage room.
7. Write-up defective merchandise.
8. Close out cash register.

II. Receiving and Checking Merchandise

A. Importance of proper receiving and checking procedures

[CTIB 062-00-11]

1. Merchandise is of little value to the store until it is properly received and checked.
2. Sales are lost if items are not quickly placed in forward stock.
3. Expensive losses may result if:
   - a. Damaged merchandise is accepted.
   - b. The correct amount of merchandise is not recorded.
   - c. Buyers costs are not carefully checked.
   - d. The wrong merchandise is accepted.
4. Accurate records must be kept of everything received to insure proper inventory control.
5. All forms must be carefully saved.

B. Origin of most apparel items

1. Shipped from vendors.
2. Delivered from store's warehouse.
3. Transferred from one branch or chain store to another.

C. Carriers most often used

(HO-6)(HO-7)

1. Motor carriers are used for bulk of items.
2. Air is expensive and usually used for merchandise needed in an emergency.
3. United Parcel Service is used for small packages needed quickly.
4. Parcel Post is used for individual items and can be expensive.
5. Boats may be used for imported items.

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D. Forms

1. The **freight bill**: (HO-8)(HO-9)(HO-10)(HO-11) (HO-12) (SA-13) [CTIB 062-00-12]
   - a. **Is written by the transport company.**
   - b. **Shows the transportation charges.**
   - c. **Is used to check for correct number of items** received.
   - d. **Is used to help trace merchandise if it goes** astray.
   - e. **Includes name of vendor, consignee,** number of pieces, weight, rate, **charges, name of receiver, driver's name,** and date and hour of delivery.
2. **The bill of lading**:
   - a. **Is written by the vendor.**
   - b. **Is a contract signed by shipper** and transport company.
   - c. **Contains the same type of** information as the freight bill.
   - d. **Is often substituted** for the freight bill.
3. **The invoice**: [CTIB 062-00-13]
   - a. **Tells how much the store owes the** vendor.
   - b. **Is written by the vendor.**
   - c. **Is packed in/on the boxes or is** sent by mail.
   - d. **Is used to check in merchandise.**
   - e. **Includes name of store receiving,** order number, date, terms, shipping **method, number of** pieces, weight, detailed description of merchandise, **unit cost, total cost,** and any discounts offered.
4. **The packing slip**: (SA-14)
   - a. **Is enclosed with each shipment.**
   - b. **Is similar to invoice.**
   - c. **Does not usually include cost of** the items.
   - d. **Is often used to check in** the merchandise.
5. The **purchase order**:
   - a. **Is written by the buyer when** the merchandise is ordered.
   - b. **Is used by the vendor in making** up the order.
   - c. **Is used by the store to check** if the correct merchandise was sent.
   - d. **Includes name of the store** receiving the goods, vendor name and number, **date of order,** shipping date, order number, shipping instructions, **terms, a detailed** description of type and quantity, cost per item, total **retail price, cancel**lation instructions and the buyer's signature.
6. **The** receiving record: (PR-3; pp. 25-30) (SA-15)
   - a. **Is kept by the individual** store.
   - b. **Is a record of everything del**ivered to the store.
   - c. **Consolidates details on all other** forms.
   - d. **Lists each delivery separately.**
   - e. **Includes record number,** date received, vendor, origin, name and number **of carrier,** number of pieces, notations regarding receiving problems **and initials of** person receiving.

E. **Checking merchandise** (SA-13)(SA-16) (HO-12)

1. When checking **against** freight bills:
   - a. **Confirm that your store** is the consignee.
   - b. **Check to see that you** have the proper number of boxes, cartons, etc.
   - c. **Examine boxes.**
2. **When checking against the invoice**: [CTIB 063-00-11] [CTIB 063-00-12]
   - a. **Count merchandise by** direct check or blind check method.
   - b. **Compare the invoice** with the buyer's purchase order.
   - c. **Verify the calculat**ions.
   - d. Check for physical damage of merchandise.
   - e. Initial the invoice.

F. **Procedure for handling non-delivered or** lost merchandise

1. Store personnel should not sign a "clear receipt" if pieces are missing, if a box has been opened, or contents are not in good condition.
2. Missing boxes, etc. require the driver's acknowledgement on the freight bill.
3. If whole shipment does not arrive it may need to be traced. (HO-13)(HO-14)(HO-15)
4. Careful records must **be kept**.
   - a. Claims are paid only on proof of loss.

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b. Forms should be filled out and sent to the proper departments according to store policy.

III. Defective/damaged merchandise (SA-13)

A. Reasons for defective or damaged merchandise:

1. Vendor errors;

2. Transportation company error;

3. Store or customer error.

B. Methods of handling [CTIB 065-00-11]

1. Mark out of inventory and send back to the vendor.

2. Repair and sell at regular retail price.

3. Mark down and sell at reduced price.

4. Mark out of stock and destroy or give to charity.

C. Forms [CTIB 065-00-12]

1. Maintain a record for the store of all damaged merchandise.

2. Vendors require a written record of any merchandise being returned before they will accept it.

3. Forms used:

a. Damage Tickets;
b. Inventory Adjustment Report;
c. Receiving Exception Report;
d. Request for Return of Merchandise;
e. Return to Vendor Form; (SA-17)
f. Memorandum or letter

IV. Price Tags (SA-13)(SA-18)

A. Common price tags (PR-6; p. 204)

1. String or plastic connectors: (PR-6; p. 205)

a. Are most often used for hanging merchandise and many accessory items.
b. Are usually in several parts.
c. Must be attached in such a way that the merchandise is not damaged and is easy to see. (SA-19)
d. Must be difficult for a customer to remove and/or switch.
e. Types include computerized and printed tags.

2. Gummed tags are used for boxed and prepackaged merchandise.

3. Pin tags are used for items that snag easily.

4. Button tags are used for garments with buttons.

5. Preticketed tags are placed on merchandise by the vendor or warehouse. (SA-20)

B. Information on price tags (HO-16)

1. Store information includes store name, branch or store number, and department number.

2. Merchandise information includes vendor number, style number, class, color, size, seasonal letter code, and cost code. (SA-21) [CTIB 067-00-11]

C. Time of tagging

1. Upon arrival of new merchandise, if not preticketed.

2. Upon arrival of preticketed merchandise with incorrect tags.

3. When tags have been removed or lost on the sales floor.

4. When customer returns merchandise which has all tags removed.

5. When price changes.

D. Sources of price tag information

1. For new merchandise:

a. Obtain from buyers purchase order.

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b. Obtain from computer sheets sent with merchandise from the store warehouse.
c. Obtain from store or department manager.

2. For lost or removed tags:

a. Check price tags of same item on sales floor.
b. Call another branch or chain store.
c. Call buyer.

E. Methods of marking

1. The key punch method is growing in popularity.

2. The price marking machine is traditional. (SA-22)

3. The hand written method is often used in small stores.

F. Retail price changes

1. Price changes include markdowns and markups. (SA-23)

2. Price changes must be properly done to insure accurate inventory records and calculation of profits earned. [CTIB 067-00-12]

V. Cash register operations (PR-1; pp. 1-36)

A. Information necessary for cash register operations (SA-24)

1. Types of cash registers: (PR-2; p. 40)

a. Simple registers that cover only basic sales information;
b. Registers that have special keys;
c. Complex registers that record all transactions which can then be fed into computers.

2. Common parts of cash register:

a. Keyboard; [CTIB 068-00-11]
b. Indication;
c. Change plate;
d. Cash drawer;
e. Sales journal window;
f. Activity counters;
g. Receipt tape slot.

3. The receipt tapes: (SA-25) [CTIB 068-00-12]

a. Are located inside the register and records the amount of each transaction, and feeds out of the register.
b. Have colored streaks that appear on the tape to indicate that the tape should be replaced immediately.

4. The detail audit tape: (SA-26)

a. Records every transaction made by the cash register.
b. Records daily totals as specified by the needs of the store.
c. Becomes a permanent record for each day and provides valuable information for future planning.
d, Must be replaced periodically.

5. Mechanisms to be reset daily: (SA-27)

a. Consecutive receipt number;
b. Date mechanism;
c. Activity counters.

B. Procedure for opening the cash register (SA-28)

1. Obtain the opening change fund.

2. Count and place the money in the cash drawer from the left to right.

a. Coins are placed in the front compartments.
b. Currency is placed face-up in the second row of compartments.
c. Large bills ($50 or $100) and checks are usually placed under the removable cash drawer.

3. List and total amounts of both coins and currency on forms provided.

4. Notify your manager if there is a discrepancy in the opening fund.

C. Procedure for making change (HO-17)

1. Manually: [CTIB 069-00-11] [CTIB 069-00-12] [CTIB 069-00-13]

a. Announce the amount of the sale;
b. Place the amount tendered on the change plate;
c. Call back to the customer the amount of the sale and the amount tendered;
d. Count the change as it is removed from the drawer;
e. **Count the ch**ange into the customer's hand;
f. Place amount tendered in the proper compartment in the cash drawer and close the drawer immediately;
g. Give the customer the receipt;
h. Thank the customer.

2. Automatically:
   a. Announce amount of the sale;
   b. Place the amount tendered by the customer on the change plate;
   c. Enter amount tendered by pressing the amount tendered key;
   d. Amount of change due will appear on the indication;
   e. Count the change shown on the indication as it is removed from the drawer;
   f. Count the change into the customer's hand;
   g. Place amount tendered in the register drawer and close the drawer immediately;
   h. Give the customer the receipt;
   i. Thank the customer.

D. Procedure for correcting register errors (HO-18) (SA-29)

1. Type of errors:
   a. Overring;
   b. Underring;
   c. Failure to ring up all necessary information;
   d. Hitting a wrong transaction key;
   e. Customer decided not to buy, after the sale has been recorded.
2. Record voids:
   a. Must be done to avoid recordkeeping problems.
   b. Type of information usually needed includes kind, amount, and signature of person making the void.
   c. Forms may be completed or the necessary information is simply recorded on the voided register receipt.
   d. Are usually placed in the register drawer until the end of the day.

E. Procedure for closing out the cash register (SA-30) or (SA-31) [CTIB 070-00-11] [CTIB 070-00-12] [CTIB 070-00-13]

1. Balance cash sales.
   a. Count currency and coins and subtract amount of opening fund and record amount on close out forms.
   b. Add all checks and gift certificates.
   c. Add all paid outs and refunds.
   d. Compare cash sales counted with total cash sales on the audit tape.
   e. Locate and record sources of errors.
2. Tabulate charge sales and record on register close out form.
   a. Total the amount on the charge tickets in the register drawer. (SA-32)
   b. Compare with total charge sales on the detail audit tape. (SA-33)
   c. Find and record any error.
3. Tabulate voids and record on close out form.
4. Total all sales.
5. Compare with total sales on the audit tape and indicate if register is proven, over or short.
6. Complete daily summary according to store policy.
7. Place cash in a bank bag and turn it in to the designated person.

VI. Checks, bank cards and credit cards [CTIB 071-00-11]

A. Customer checks

1. All parts of a check should be carefully examined:
   a. Check number;
   b. Customer's name, address and phone number;

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c. Date;
d. Payee,
e. Amount of check;
f. Signature.

2. Follow procedure for accepting checks: (SA-34)
    a. Inspect the check carefully for any discrepancies;
    b. Record proper customer identification on the check; [CTIB 071-00-12]
    c. Seek check approval according to store policy. [CTIB 071-00-13]

B. Customer bank cards (SA-35)

1. All bank cards should be carefully examined:
    a. Expiration date;
    b. Customer's signature on the back of card.
2. Follow procedures for accepting bank cards:
    a. Imprint credit card on the proper bank card slip;
    b. Record sale;
    c. Obtain authorization from bank card company, as required;
    d. Check the "hot list" if the card does not need to be authorized by phone;
    e. Obtain the customer's signature.

C. Customer's store credit card (HO-19)

1. All store credit cards should be carefully examined:
    a. Expiration date;
    b. Customer signature on the back of the card.
2. Follow procedures for accepting store credit cards:
    a. Imprint card on the sales ticket and record the sale;
    b. Seek authorization if necessary.

VII. Inventory

A. Proper inventory procedures (SA-36)(SA-37)(SA-38)

1. Help to maintain the correct amount of merchandise on hand at all times. [CTIB 073-00-11]
2. Provide information that indicates whether the business is making a net profit or not. [CTIB 073-00-12] [CTIB 073-00-13]
3. Alert management to how much stock shrinkage is taking place.
4. Are necessary for tax purposes.

B. Kinds of inventory

1. Perpetual: (HO-20)
    a. Is kept daily;
    b. Is a count of what has been received, sold and what is in stock;
    c. Is a "book inventory" of what should be in stock, but not an actual count.
2. Physical: (PR-5; pp. 152-153)
    a. Is a count in which each piece of merchandise is physically counted by hand or by computers.
    b. Frequency is determined by store policy.
    c. Will indicate the amount of shortages.

C. Inventory records

1. Unit control: (PR-2; pp. 175-176)
    a. Shows the actual number of pieces of merchandise in stock.
    b. Is most often kept by computers but may be kept by hand.
    c. Will provide information about merchandise orders, sales, returns and transfers.
2. Dollar control: (PR-2; pp. 174-175)
    a. Shows how much merchandise in dollar amounts is in stock.
    b. When perpetual, will continually show the dollar value of the merchandise on hand.
    c. When physical, will show dollar value only when an inventory is taken.
    d. Is taken according to store policy.

# STUDENT ACTIVITIES

## STUDENT ACTIVITIES

Vocabulary: Have students keep a vocabulary notebook of key words for this unit. SA-1

Locating Stock: See page 17. Reproduce the case study and the stockroom floor plan and give a copy to each student. Have them return the first page, with their answers. For an actual "hands-on" activity, have the students bring shoe boxes, remark the boxes according to the code on the case study and set the boxes up across the back of the classroom. Role-play the part of a customer and request certain shoes for students to bring to you. SA-2

PR-2, Experience 14-12, p. 218. SA-3

PR-2, Experience 12-11, p. 185. SA-4

PR-2, Experience 14-4, p. 210. SA-5

Straighten Stock: Bring the following to class: (1) "T" shirts, scarves, sweaters and/or other merchandise to fold (10 items or more), (2) a dress with a belt, a blouse with a bow, a shirt, cuffed trousers, pants with a zipper and/or other hanging merchandise with hangers. First, have working students demonstrate the proper methods of folding the first group of merchandise. Then have each student fold and arrange the first group of items on a table. You should give feedback to each student on the task performed. Next, divide the class into groups of 3, 4 or 5 (depending upon the number of hanging items you can bring to class). Each group should be given at least six apparel items on hangers and a place to hang them (this can be open doors, coat racks, curtain rods across chairs, etc.). The items should be unstraightened (i.e. zippers unzipped, shirts unbuttoned, cuffs turned wrong, collars and sleeves tucked in, belts unbuckled, bows untied, etc.--with some hangers turned wrong way). Ask one or two members of the group to straighten the items as it should be done in an apparel store. After this is done the remaining members should carefully check to see if the job was done properly. After the entire group is satisfied that their presentation is correct, the instructor should check each group and give feedback to the entire class on the quality of work and correct anything that is overlooked. Be sure items are hung according to classification with short items hung in front of long items, as well as having each piece neat and straight and hangers turned in the same direction. SA-6

PR-2, Experience 14-5, p. 211. SA-7

Want Slips: See page 21. Reproduce the case study for each student and have them complete the want slip and questions. SA-8

PR-6, Experience 14-1, p. 181. SA-9

Advise Buyer of Merchandise Needs: See page 23. Reproduce the case study, the basic stock list and the stock requisition for each student. Have them complete the stock requisition. SA-10

PR-7, Simulation 1, Incident 20, p. 72-4. SA-11

PR-2, Experience 11-7, p. 157. SA-12

PR-7, Simulation 6, pp. 168-178. Note to Teacher: This is an excellent simulation covering checking and receiving, defective merchandise, marking price tags, and distributing merchandise. It can be broken up and used at the appropriate points in the outline or used as a culminating activity near the end of this unit. SA-13

PR-2, Experience 12-10, pp. 182-183. SA-14

PR-6, Experience 15-1, p. 201. SA-15

PR-2, Experience 12-8, p. 180. SA-16

PR-6, Experience 15-3, pp. 202-203. SA-17.

PR-2, Experience 11-12, p. 164. SA-18

Price Tags: Purchase a plastic connector gun (or borrow one from a store) and plastic connectors. Bring old price tags that you have collected and items of apparel (appropriate for plastic connector tags). Have the students place price tags on several of the apparel items. They should learn to use the gun correctly as well as the correct placement of the ticket so as not to damage the merchandise. After each student finishes, remove the tags and begin again with the next student, until each student has had an opportunity to learn to use the gun. If you have an old silk scarf and tee shirt, let them place the tickets incorrectly to see the damage done. SA-19

PR-6, Experience 15-5, p. 206. SA-20

Seasonal Letter Code: See page 27. Reproduce the activity sheet for each student. SA-21

Marking Price Tags: See page 29. Purchase or borrow a pricing gun and reproduce and cut out an appropriate number of price tags. Have students practice putting prices on the tags with gun. Ask them to glue one marked tag to a sheet of paper and turn it in. SA-22

Marking and Recording Price Changes: See page 30. Reproduce the case study and operations bulletin on "Retail Price Changes" for each student. SA-23

Ringing the Sale: Use the cash register available and point out the different parts. Reproduce the activity sheet and a sales tax chart and have each student practice ringing the register using the activity sheet. An alternative to this activity is to set up a cash register training session with one of your department stores. This alternative is effective because more registers are available and the registers will probably be more up-to-date than those available in most classrooms. See page 36. SA-24

Changing Tapes: Because of the wide variety of cash registers, you must instruct your students on the procedure for changing the tapes (receipt and detail audit) on the register that you have available. Give each student an opportunity to practice changing the tapes until they can do it correctly. SA-25

Reading the Detailed Audit Tape: See page 37. Reproduce the activity sheet and operations bulletin for each student. SA-26

| | |
|---|---|
| Setting Activity Counters: Instruct the student on the proper procedure for setting this mechanism on your cash register and give them the opportunity to reset each item. | SA-27 |
| Opening Change Fund: See page 39 . Reproduce one activity sheet for each student. | SA-28 |
| Voids: See pages 41-45 . Reproduce operations bulletin, case study, and void forms for each student. | SA-29 |
| PR-7, Simulation 1, Incident 18, pp. 61-71. | SA-30 |
| PR-2, Experience 4-10, pp. 50-51. | SA-31 |
| PR-6, Experience 5-6, p. 53. | SA-32 |
| Register Close Out: Have working students bring copies of close out forms used in their store and compare the forms during class. | SA-33 |
| PR-7, Simulation 1, Incident 14, p. 42 and p. 44. | SA-34 |
| Accepting Bank and Credit Cards: See pages 46-48 . Reproduce the activity sheet and the operations bulletin for each student. | SA-35 |
| PR-2, Experience 12-6, pp. 177-178. | SA-36 |
| PR-2, Experience 12-4, p. 176. | SA-37 |
| PR-2, Experience 12-3, p. 175. | SA-38 |

SA-2

# LOCATING STOCK

Assume that when you reported to work today at Logan's, you were asked to fill in for Ms. Porter in the children's shoe department. Ms. Porter has a doctor's appointment and will only be gone a few hours. You have been given information on the stock locations of the shoes. During the time you are there, you wait on six customers who asked to be shown the following shoes:

| | | Stock Location |
|---|---|---|
| CUSTOMER 1: | Yellow tennis shoe, with stripe, size 3C | |
| | Lt. blue tennis shoe with stripe, size 3C | |
| CUSTOMER 2: | White wedge sandle, size 4A | |
| | Berry flat sandle, size 4A | |
| CUSTOMER 3: | Brown flat sandle, size 5 1/2D | |
| CUSTOMER 4: | Red tennis shoe, solid, size 1C | |
| CUSTOMER 5: | Black dress shoe, Mary Jane, size 2B | |
| | Black dress shoe, open toe, size 2B | |
| CUSTOMER 6: | Green Sandle wedge, size 3 1/2C | |

Give name and location of any substitute you would bring if there are any outs.

| | | |
|---|---|---|
| CUSTOMER 1: | | |
| CUSTOMER 2: | | |
| CUSTOMER 3: | | |
| CUSTOMER 4: | | |
| CUSTOMER 5: | | |
| CUSTOMER 6: | | |

The shoes have the following style numbers:

Flat sandles - 19
Wedge sandles - 30
Thong sandles - 59
Plain tennis shoe - 25
Stripe tennis shoe - 27
Mary Jane dress shoe - 61
Open toe dress shoe - 65
Slip-on dress shoe - 70

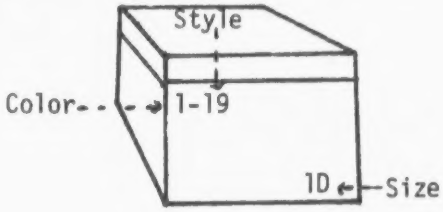
Color codes are always marked on the box. The code is as follows:

Black - 1
Brown - 2
Navy - 3
Red - 4
Tan(beige) - 5
Lt. blue - 6
Grey - 7
White - 8

Fashion Colors

Berry - 10
Green - 11
Orange - 12
Yellow - 13

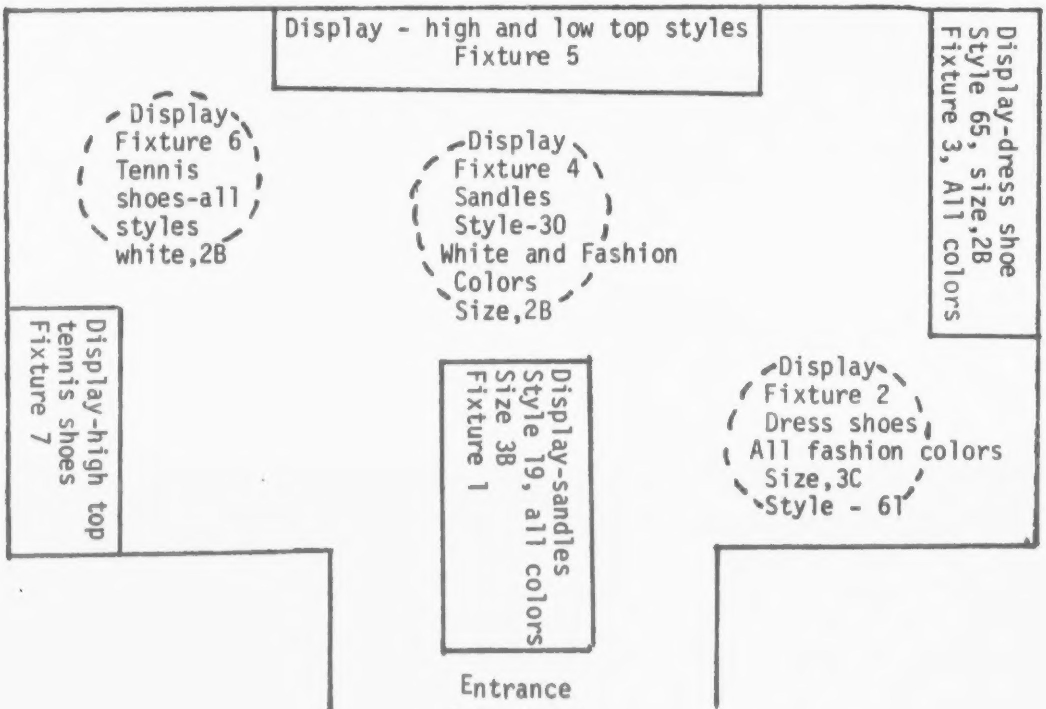
Boxes are marked in the following manner:


Style
Color
1-19
1D
Size

The stock room is arranged first by type of shoe (dress, sandle, tennis, etc.), then by color, style and size. This makes it easier to find a similar shoe in the same color and size, if you are unable to fit a customer in a requested style.

Using a floor plan of the stockroom and sales floor (provided by your instructor) indicate where you would find the requested shoes. Place this information in the blanks on the first page under Stock Location. The stockroom location will be shown by aisle letter and shelf number and shelf letter. For example, a black flat sandle, size 2B will have the following location, A-1-e. Shoes will also be found in forward stock (on display). Locate these shoes by placing the letters F.S. (forward stock) and the display fixture number. For example, the location of a white wedge sandle, size 2B will be FS-4. If a shoe is not in stock, simply mark OUT, and indicate an appropriate substitute.

CHILDREN'S SHOE DEPARTMENT FLOOR PLAN


Display - high and low top styles Fixture 5
Display-dress shoe Style 65, size,2B Fixture 3, All colors
Display Fixture 6 Tennis shoes-all styles white,2B
Display Fixture 4 Sandles Style-30 White and Fashion Colors Size,2B
Display-high top tennis shoes Fixture 7
Display-sandles Style 19, all colors Size 3B Fixture 1
Display Fixture 2 Dress shoes All fashion colors Size,3C Style - 61
Entrance

# STOCKROOM FLOOR PLAN

| | | | | | | | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| E | 1-19<br>2C | 1-19<br>4C | 1-30<br>6½C | 2-19<br>2C | 2-19<br>3C | 2-30<br>5B | | 3-30<br>3C | 3-19<br>5B | | 4-19<br>2B | 4-19<br>4C | 4-19<br>5C | 4-30<br>6C | 8-19<br>2C | 8-30<br>3B | 8-30<br>4A | 8-30<br>6C | 11-19<br>2B | 13-30<br>3B | 13-30<br>6C |
| D | 1-9<br>2B | 1-19<br>4A | 1-19<br>6A | 2-19<br>2B | 2-19<br>3B | 2-19<br>5A | 2-59<br>6B | 3-59<br>2C | 3-30<br>4½C | | 4-30<br>1D | 4-19<br>3C | 4-19<br>5A | 4-19<br>6A | 8-19<br>2B | 8-19<br>3B | 8-19<br>3½B | 8-30<br>5B | 10-30<br>4C | 13-19<br>2C | 13-19<br>6A |
| C | -30<br>1½C | 1-30<br>3½C | 1-19<br>5½D | 2-59<br>1C | 2-30<br>2½D | 2-30<br>4C | 2-30<br>6B | 3-19<br>2B | 3-30<br>4C | 3-30<br>6½C | 4-30<br>1C | 4-19<br>3B | 4-30<br>4D | 4-59<br>5D | 8-30<br>1C | 8-30<br>2½C | 8-57<br>3C | 8-19<br>5A | 10-19<br>4A | 11-30<br>5B | 13-19<br>5B |
| B | -30<br>1C | 1-19<br>3C | 1-19<br>5C | 2-30<br>1C | 2-59<br>2D | 2-30<br>4C | 2-19<br>6A | 3-30<br>1D | 3-19<br>4A | 3-30<br>6B | 4-30<br>1B | 4-59<br>2C | 4-19<br>4D | 4-59<br>5C | 8-19<br>1C | 8-30<br>2D | 8-59<br>3B | 8-30<br>4C | 10-30<br>3C | 11-19<br>3½C | 13-19<br>4A |
| A | 1-19<br>1B | 1-19<br>2½D | 1-30<br>5B | 2-19<br>1A | 2-30<br>2C | 2-19<br>4B | 2-19<br>5½D | 3-19<br>1C | 3-30<br>3½C | 3-59<br>5C | 4-19<br>1B | 4-30<br>2C | 4-19<br>4C | 4-30<br>5C | 8-19<br>1B | 8-30<br>2C | 8-30<br>3B | 8-30<br>4B | 10-19<br>2B | 11-19<br>3C | 13-30<br>3½B |
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 |

Aisle A ( Sandles)

| | | | | | | | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| E | 3-27<br>2½C | 3-25<br>4½C | 3-27<br>5D | 3-27<br>6½D | 4-27<br>2C | 4-27<br>4½C | | 5-25<br>3C | 5-25<br>5A | 5-27<br>6C | 6-25<br>2C | 6-25<br>5B | | 8-25<br>2A | 8-25<br>4A | 8-27<br>5C | | 11-25<br>1B | 11-25<br>6C | 13-27<br>2B | 13-27<br>6D |
| D | 3-27<br>2C | 3-25<br>4A | 3-27<br>5C | 3-27<br>6½C | 4-27<br>2B | 4-27<br>4C | 4-25<br>6C | 5-25<br>3½C | 5-25<br>4½C | 5-25<br>6C | 6-25<br>2B | 6-25<br>4A | | 8-27<br>1D | 8-27<br>3½C | 8-27<br>5B | 8-27<br>6C | 10-27<br>4C | 11-27<br>5C | 13-25<br>2B | 13-25<br>4C |
| C | 3-27<br>1½C | 3-27<br>3C | 3-27<br>5B | 3-27<br>6C | 4-25<br>2B | 4-25<br>4B | 4-27<br>5B | 5-27<br>2B | 5-27<br>4C | 5-25<br>6C | 6-27<br>1C | 6-25<br>3½B | 6-25<br>6½D | 8-27<br>1C | 4-25<br>3B | 8-25<br>5A | 8-25<br>6C | 10-25<br>4C | 11-25<br>4C | 12-25<br>5A | 13-27<br>3C |
| B | 3-27<br>1C | 3-25<br>3B | 3-25<br>5B | 3-25<br>6B | 4-25<br>1½C | 4-27<br>3½C | 4-25<br>5B | 5-25<br>1C | 5-25<br>4B | 5-25<br>6A | 6-25<br>1C | 6-25<br>3B | 6-25<br>6C | 8-25<br>1C | 8-25<br>2½C | 8-27<br>4C | 8-25<br>6A | 10-25<br>3C | 11-27<br>3D | 12-27<br>4C | 13-27<br>3B |
| A | 3-25<br>1B | 3-27<br>2½D | 3-25<br>5A | 3-25<br>5½C | 4-25<br>1C | 4-25<br>3B | 4-25<br>5A | 5-25<br>1B | 5-27<br>3C | 5-27<br>5C | 6-25<br>1B | 6-27<br>3C | 6-27<br>5½C | 8-25<br>1B | 8-27<br>2B | 8-27<br>4C | 8-27<br>5D | 10-25<br>2B | 11-27<br>2C | 12-25<br>4C | 13-25<br>3B |
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 |

Aisle B (Tennis Shoes)

| | | | | | | | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| E | -65<br>2C | 1-70<br>4C | 1-65<br>5B | 1-61<br>6½A | 2-61<br>2B | 2-61<br>3B | 2-65<br>4C | 2-61<br>5½B | | 3-70<br>3½C | 3-65<br>5B | | 6-65<br>3B | 6-65<br>5C | | 8-65<br>2B | 8-65<br>3C | 8-65<br>5B | 8-70<br>6½C | 10-70<br>5A | 11-70<br>6C |
| D | -61<br>2B | 1-65<br>4A | 1-61<br>5A | 1-70<br>6D | 2-70<br>1½D | 2-61<br>2½C | 2-65<br>4B | 2-65<br>5B | | 3-61<br>3B | 3-61<br>5B | | 6-61<br>3B | 6-61<br>5A | 6-61<br>6½C | 8-61<br>2B | 8-61<br>3C | 8-61<br>5A | 8-65<br>6D | 10-70<br>4D | 11-70<br>5B |
| C | -70<br>1C | 1-65<br>3½C | 1-61<br>4½C | 1-70<br>6C | 2-61<br>1½C | 2-70<br>2D | 2-61<br>4A | 2-61<br>5B | 2-70<br>6D | 3-70<br>2C | 3-61<br>5A | | 6-65<br>2B | 6-65<br>4½C | 6-65<br>6B | 8-70<br>1D | 8-61<br>3B | 8-70<br>4C | 8-65<br>6A | 10-70<br>4C | 11-70<br>4C |
| B | -70<br>1B | 1-61<br>3D | 1-70<br>4D | 1-65<br>6C | 2-65<br>1D | 2-70<br>2C | 2-65<br>3½C | 2-61<br>5A | 2-65<br>6B | 3-65<br>2C | 3-65<br>4½C | 3-70<br>6C | 6-61<br>1C | 6-61<br>4½B | 6-61<br>6B | 8-65<br>1C | 8-70<br>2½B | 8-65<br>4B | 8-61<br>6A | 10-70<br>3C | 11-70<br>2C |
| A | -61<br>1B | 1-70<br>2½C | 1-70<br>4C | 1-65<br>5C | 2-61<br>1B | 2-65<br>2C | 2-61<br>3C | 2-70<br>4½D | 2-61<br>6B | 3-61<br>1C | 3-65<br>4D | 3-61<br>6B | 6-61<br>1B | 6-61<br>4C | 6-61<br>5½C | 8-61<br>1B | 8-70<br>2C | 8-70<br>3½D | 8-70<br>5½C | 10-70<br>2B | 11-70<br>1B |
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 |

Aisle C ( Dress Shoes)

SA-2

KEY:

| | Stock Location |
|---|---|
| CUSTOMER 1: | B- 21-c |
| | B- 12-a |
| CUSTOMER 2: | A- 17-e |
| | A- 19-c |
| CUSTOMER 3: | A- 7-a |
| CUSTOMER 4: | B- 5-a |
| CUSTOMER 5: | C- 1-d |
| | FS-3 |
| CUSTOMER 6: | OUT |
| Substitute for out | A- 20-b (Customers should be brought the color they are looking for first) |

## FILL OUT A WANT SLIP

You are working in the Men's Sportswear Department (#10). Today Mrs. Watkins came in looking for corduroy jeans, waist 31, length 36. Logan's has no corduroy jeans in that size in stock. Also, at different times during the day, two people requested button-down, round collar shirts in pink, which you do not carry. You also notice that your light blue, oxford cloth, Arrow shirt, style 432 has been moving fast, and you only have nine on hand. This shirt sells for $18.62.

Inform the buyer of your department of the above information by filling out the following want slip. Use today's date and store #3.

**SEND TO OFFICE AT ONCE**

**WANT SLIP**

**Salesperson**________________ **Date**__________ **Store No**________ **Dept. No.** ______

**Code: SO - special order OS - out of stock**

| Code | Description (item, color, size, price) | No. of requests | Customer name & address if special order |
|---|---|---|---|
| | | | |
| | | | |

| The following stock is low: Vendor, style, color, price | No. of pieces in stock |
|---|---|
| | |
| | |

**SUGGEST A SUBSTITUTE**

Name three reasons why want slips are valuable and the time spent filling them out is important.

1.________________________________________

2.________________________________________

3.________________________________________

SA-8

KEY:

## SEND TO OFFICE AT ONCE

## WANT SLIP

Salesperson Student Name Date Today's date Store No 3 Dept. No. 10

Code: SO - special order OS - out of stock

| Code | Description (item, color, size, price) | No. of requests | Customer name & address if special order |
|---|---|---|---|
| OS | Corduroy jeans; waist 31, length 36 | 1 | |
| OS | Button-down, round collar shirt, pink | 2 | |

| The following stock is low: Vendor, style, color, price | No. of pieces in stock |
|---|---|
| Arrow, oxford cloth shirt, style #432, light blue | 9 |
| | |

SUGGEST A SUBSTITUTE

1. Alert the buyer to stock conditions
2. Records customer preferences
3. Keeps salespeople alert to customer needs

SA-10

# ADVISE BUYER OF MERCHANDISE NEEDS

When you arrive at work today in the Girl's Department at Logan's, your manager asks you to requisition the necessary number of ROUST ABOUT jeans and leave the requisition form on her desk before you leave tonight. In order to complete this task you will need to count the jeans, compare your count with the minimum quantity on the Basic Stock List, and then determine just how many jeans should be requisitioned. Your instructor will give you the Basic Stock List for ROUST ABOUTS and the requisition form. Fill in the requisition form using today's date, store number 3, department number 14, and class 18. ROUST ABOUTS address is 1926 Seventh Avenue, New York, NY 10144.

After counting the jeans, you find that you have the following ROUST ABOUT jeans in stock:

| Style | Size | Color | Qty-on-hand |
|---|---|---|---|
| 496 | 6 | Blue d. | 6 |
| | 8 | | 7 |
| | 10 | | 4 |
| | 12 | | 6 |
| | 6 | Beige c. | 3 |
| | 8 | | 7 |
| | 10 | | 10 |
| | 12 | | 8 |
| | 6 | Grey c. | 5 |
| | 8 | | 5 |
| | 10 | | 5 |
| | 12 | | 7 |
| 497 | 6 | Blue d. | 3 |
| | 8 | | 8 |
| | 10 | | 6 |
| | 12 | | 7 |
| | 6 | Beige c. | 9 |
| | 8 | | 8 |
| | 10 | | 10 |
| | 12 | | 12 |
| | 6 | Grey c. | 2 |
| | 8 | | 3 |
| | 10 | | 9 |
| | 12 | | 4 |
| 498 | 6 | Blue d. | 6 |
| | 8 | | 3 |
| | 10 | | 6 |
| | 12 | | 10 |
| | 6 | Beige c. | 2 |
| | 8 | | 1 |
| | 10 | | 5 |
| | 12 | | 4 |
| | 6 | Grey c. | 5 |
| | 8 | | 6 |
| | 10 | | 2 |
| | 12 | | 8 |

When requisitioning items, you should request enough merchandise to bring stock levels up to maximum. You do not need to requisition a size if you have at least two over the minimum required.

SA-10

## BASIC STOCK LIST

Store No. 3 Dept. No. 3 Item ROUST ABOUT jeans

Vendor and address: ROUST ABOUT, 1926 Seventh Avenue, New York, NY 10144

| Style No. | Description | Color | Size | Min.Qty. | Max.Qty. | Retail Price |
|---|---|---|---|---|---|---|
| 496 | tapered legs | blue d. | 6 | 5 | 12 | $15.98 |
| | | | 8 | 5 | 12 | |
| | | | 10 | 7 | 16 | |
| | | | 12 | 7 | 16 | |
| | | beige c. | 6 | 4 | 10 | $13.98 |
| | | | 8 | 4 | 10 | |
| | | | 10 | 6 | 14 | |
| | | | 12 | 6 | 14 | |
| | | grey c. | 6 | 3 | 8 | $13.98 |
| | | | 8 | 3 | 8 | |
| | | | 10 | 5 | 12 | |
| | | | 12 | 5 | 12 | |
| 497 | straight leg | blue d. | 6 | 5 | 12 | $15.98 |
| | | | 8 | 5 | 12 | |
| | | | 10 | 7 | 16 | |
| | | | 12 | 7 | 16 | |
| | | beige c. | 6 | 4 | 10 | $13.98 |
| | | | 8 | 4 | 10 | |
| | | | 10 | 6 | 14 | |
| | | | 12 | 6 | 14 | |
| | | grey c. | 6 | 3 | 8 | $13.98 |
| | | | 8 | 3 | 8 | |
| | | | 10 | 5 | 12 | |
| | | | 12 | 5 | 12 | |
| 498 | flair legs | blue d. | 6 | 3 | 8 | $15.98 |
| | | | 8 | 3 | 8 | |
| | | | 10 | 3 | 8 | |
| | | | 12 | 5 | 12 | |
| | | beige c. | 6 | 2 | 6 | $13.98 |
| | | | 8 | 2 | 6 | |
| | | | 10 | 3 | 8 | |
| | | | 12 | 4 | 10 | |
| | | grey c. | 6 | 2 | 6 | $13.98 |
| | | | 8 | 2 | 6 | |
| | | | 10 | 3 | 8 | |
| | | | 12 | 4 | 10 | |

Additional Comments: These items should be checked once a week and requisitions turned in for any items near or below the minimum quantity.

Rep. is Sally Smith

# LOGAN'S

## STOCK REQUISITION

Store No. _______ Dept. No. _____ Date ______________ By ___________________________

Vendor _____________________________________ Class __________

Address_____________________________________

Merchandise Description ________________________________________________

| Style # | Color | Size | Qty. Needed | Style # | Color | Size | Qty. Needed |
|---|---|---|---|---|---|---|---|
|  |  |  |  |  |  |  |  |

SA-10

KEY:

# LOGAN'S

## STOCK REQUISITION

Store No. 3 Dept. No. 14 Date Today's date By Student Name

Vendor Roust About Class 18

Address 1926 Seventh Ave., New York, N.Y. 10144

Merchandise Description jeans

| Style # | Color | Size | Qty. Needed | Style # | Color | Size | Qty. Needed |
|---|---|---|---|---|---|---|---|
| 496 | Blue denium | 6 | 6 | | | | |
| | | 10 | 12 | | | | |
| | | 12 | 10 | | | | |
| | Beige cord | 6 | 7 | | | | |
| | Grey cord | 10 | 7 | | | | |
| 497 | Blue denium | 6 | 9 | | | | |
| | | 10 | 10 | | | | |
| | | 12 | 9 | | | | |
| | Grey cord | 6 | 6 | | | | |
| | | 8 | 5 | | | | |
| | | 12 | 8 | | | | |
| 498 | Blue denium | 8 | 5 | | | | |
| | Beige cord | 6 | 4 | | | | |
| | | 8 | 5 | | | | |
| | | 12 | 6 | | | | |
| | Grey cord | 10 | 6 | | | | |

## SEASONAL LETTER CODE

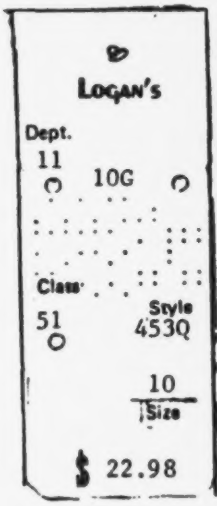
Today (October 15) your manager asks you to go through a rack and several tables in the accessory department and pull all merchandise that is over a month old, so that it can be marked down. The styles that you sort through are illustrated by the price tags below (one tag for each style). Which styles will you pull for your manager?

You will find the seasonal letter in the center of each tag. The date is determined by reading the numbers as the days of the month and letters as the months. The code for the months is T I M E X Y L O G A N S (January = T, February = I, etc.). Which styles will you pull for your manager?

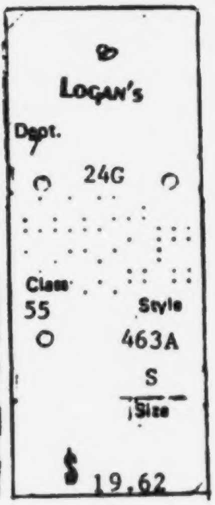
(1) Mark the letter of the tags for the merchandise that you would pull for your manager. ____________________________________________

(2) Why is it not necessary to have the year indicated on the season letter for fashion merchandise? ____________________________________________

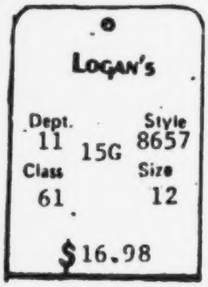
______________________________________________________________________________________________


LOGAN'S
Dept.
11
10G
Class
51
Style
453Q
10
Size
$ 22.98

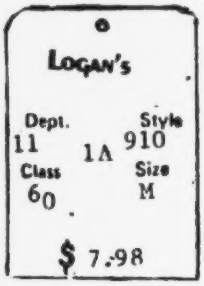
A


LOGAN'S
Dept.
24G
Class
55
Style
463A
S
Size
$ 19.62

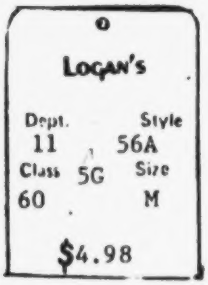
B


LOGAN'S
Dept.
11
15G
Style
8657
Class
61
Size
12
$16.98

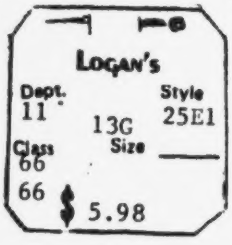
C


LOGAN'S
Dept.
11
1A
Style
910
Class
60
Size
M
$ 7.98

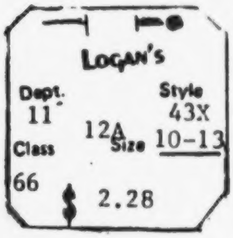
D


LOGAN'S
Dept.
11
5G
Style
56A
Class
60
Size
M
$4.98

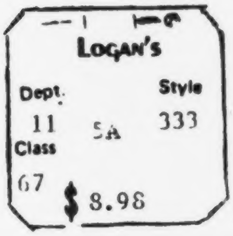
E


LOGAN'S
Dept.
11
13G
Style
25E1
Class
66
Size
66
$ 5.98

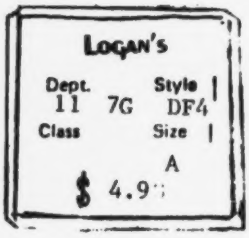
F


LOGAN'S
Dept.
11
12A
Style
43X
Size
10-13
Class
66
$ 2.28

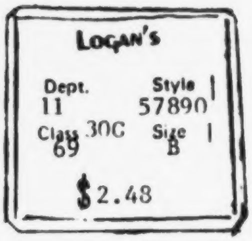
G


LOGAN'S
Dept.
11
5A
Style
333
Class
67
$ 8.98

H


LOGAN'S
Dept.
11
7G
Style
DF4
Class
Size
A
$ 4.9

I


LOGAN'S
Dept.
11
Style
57890
Class
69
30G
Size
B
$2.48

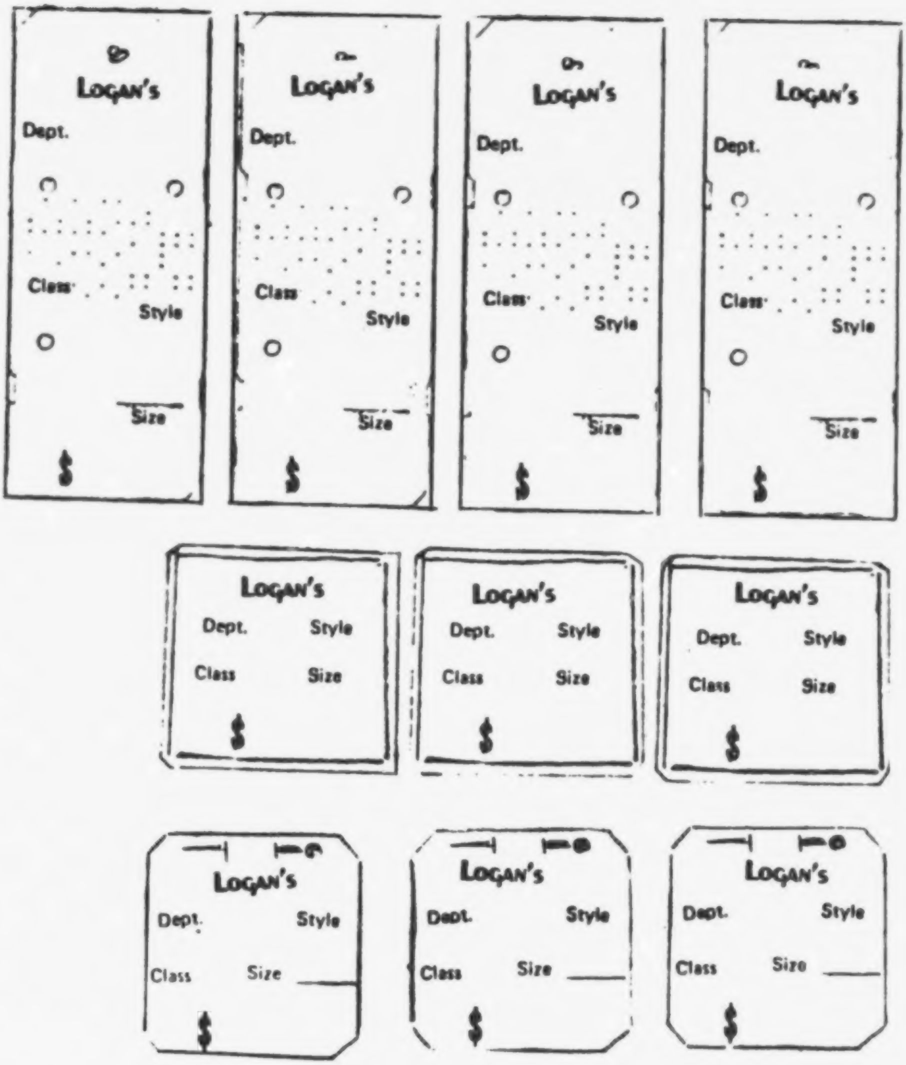
J

392

KEY:

(1) A, C, E, F, I

(2) Because merchandise is not usually kept for longer than three months.

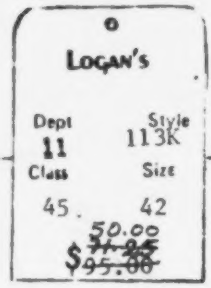

Logan's
Dept.
Class
Style
Size
$

## MARKING AND RECORDING PRICE CHANGES

Your manager, Sally Ross, has asked you to make some price changes for several items in your department today. She also asked you to record these changes on the price change form. Since Mrs. Ross expects to be in a department managers' meeting most of the day, she gives you an operations bulletin on "Retail Price Changes". She asks you to refer to this bulletin if you have any questions. You are working in Logan's (#3), Men's Dept. (#11) on September 10.

The changes are listed below:

(1) Your department has had a difficult time moving velvet smoking jackets. The buyer has taken two markdowns, but there are still four of these jackets on the sale rack. Your manager tells you to take another markdown of 25%. Use the price tag and the retail price change form below to make the appropriate changes.



LOGAN'S

Dept 11

Style 113K

Class 45

Size 42

$~~95.00~~ ~~71.25~~ 50.00

**1290**

# LOGAN'S

## Retail Price Change

Store No.______ Department No.________ Date ______________ ____

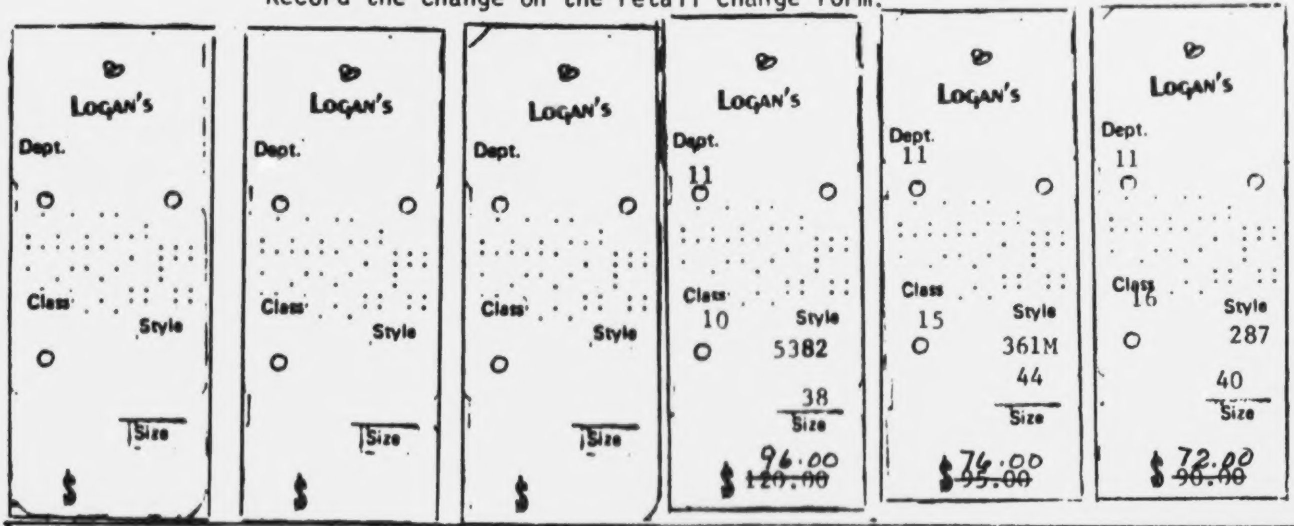
Type of Change:____Markdown____Markup____Markdown Cancellation____Markup Cancellation

By________________________________Authorized by______________________________

| Style No. | Class | Article | Qty. | Old Price | New Price | | Change Extension |
|---|---|---|---|---|---|---|---|
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | TOTAL | |

Why the change was necessary:

(2) Your pre-season suit sale has just ended. Customers can no longer purchase suits at 20% off the regular selling price. You have ten wool suits, style 5382, fourteen wool/polyester suits, style 361M, and eight nylon and wool blend suits, style 287. Prepare new price tags for the coats, using the old price tags below as a reference. Record the change on the retail change form.



LOGAN'S
Dept. 11
Class 10
Style 5382
38
Size
$ ~~120.00~~ 96.00

LOGAN'S
Dept. 11
Class 15
Style 361M
44
Size
$ ~~95.00~~ 76.00

LOGAN'S
Dept. 11
Class 16
Style 287
40
Size
$ ~~90.00~~ 72.00

**1290**

# LOGAN'S

## Retail Price Change

Store No._______ Department No.________ Date ______________

Type of Change:____Markdown____Markup____Markdown Cancellation____Markup Cancellation

By____________________________ Authorized by____________________________

| Style No. | Class | Article | Qty. | Old Price | New Price | Amt. of Adjustm. | Change Extension |
|---|---|---|---|---|---|---|---|
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | TOTAL | |

Why the change was necessary:

# LOGAN'S

# Operations Bulletin

RE: RETAIL PRICE CHANGES

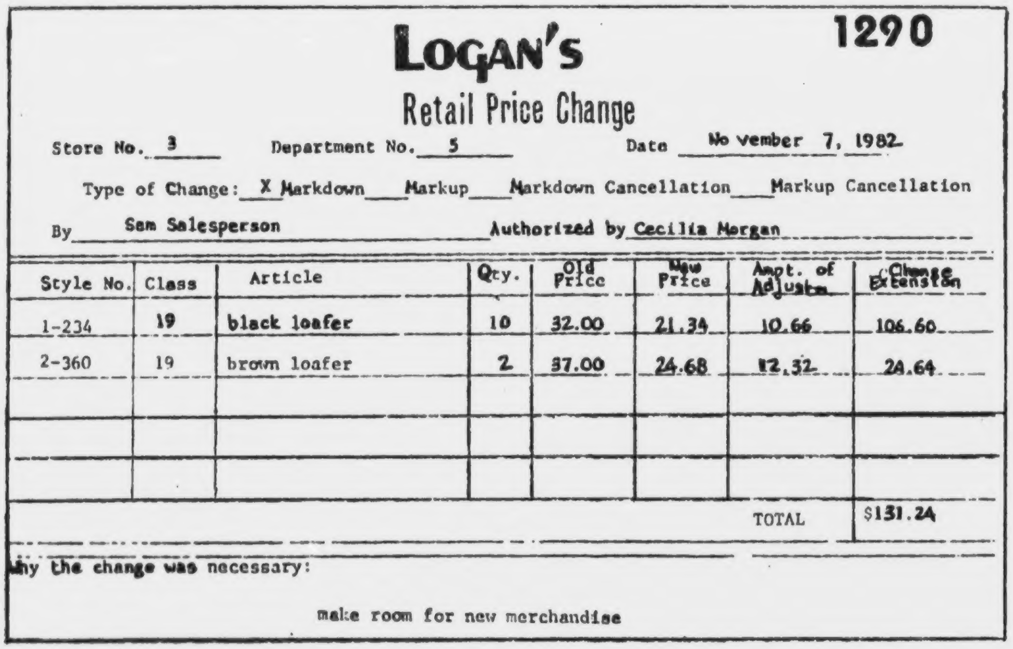
The original retail price is not always the price at which merchandise is actually sold. As customer demand goes up and down, so do LOGAN'S retail prices. The major reasons for price changes are:

(1) Markdowns - reductions in the original retail price. The cause may be (a) special sales promotion, (b) end of the season clearance, (c) slow moving stock, (d) becoming shopworn or damaged, (e) too many in stock, or (f) markup cancellations. A first markdown of one third is a typical markdown for fashion merchandise.

(2) Additional markups - an increase in the original retail price. The cause may be (a) increase in cost to retailer, (b) belief that the original price was too low, or (c) markdown cancellation (after a sale).

Whatever the reason and whether it is up or down, it is essential that the price change be recorded. LOGAN'S uses a price change form when recording changes. When price changes are not recorded or not recorded properly, we do not have the necessary information for our inventory records or to determine the accurate amount of profit earned.

The following is an example of our Retail Price Change form.



**LOGAN'S** **1290**

**Retail Price Change**

Store No. 3 Department No. 5 Date November 7, 1982

Type of Change: X Markdown ___ Markup ___ Markdown Cancellation ___ Markup Cancellation

By Sam Salesperson Authorized by Cecilia Morgan

| Style No. | Class | Article | Qty. | Old Price | New Price | Amt. of Adjustm. | Change Extension |
|---|---|---|---|---|---|---|---|
| 1-234 | 19 | black loafer | 10 | 32.00 | 21.34 | 10.66 | 106.60 |
| 2-360 | 19 | brown loafer | 2 | 37.00 | 24.68 | 12.32 | 24.64 |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | TOTAL | $131.24 |

Why the change was necessary:

make room for new merchandise

# LOGAN'S

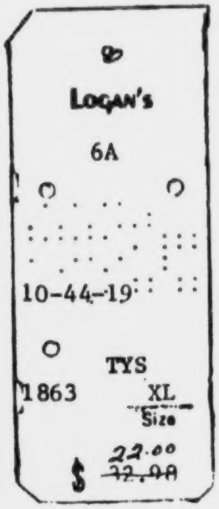
# Operations Bulletin

RETAIL PRICE CHANGES (cont.) page 2

Complete the Retail Price Change in the following manner:

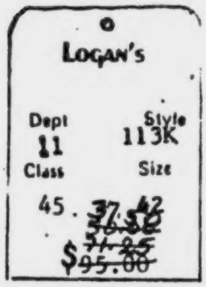
1. Enter the store number.
2. Enter the department number that you find on the price ticket.
3. Enter the date the price change is made.
4. Check the type of price change.
5. Sign the price change form.
6. Get department manager's or buyer's signature.
7. Enter the style of the item from the price ticket.
8. Enter the class of the item from the price ticket.
9. Write a brief description of the merchandise.
10. Enter the number of items (of the same style no.) with a price change.
11. Write the original retail price.
12. Write the new retail price (after change).
13. Write the difference in the present and the revised price.
14. Multiply the quantity by the difference and record the total.
15. Total the extension column.
16. Write the reason for the change.

This ticket is an example of a markdown.



KEY:

SA-23



LOGAN'S

Dept 11

Style 113K

Class 45

Size 42

37.50
~~50.00~~
~~71.25~~
~~$95.00~~

**1290**

# LOGAN'S

## Retail Price Change

Store No. 3 Department No. 11 Date September 10, 198

Type of Change: X Markdown ___ Markup ___ Markdown Cancellation ___ Markup Cancellation

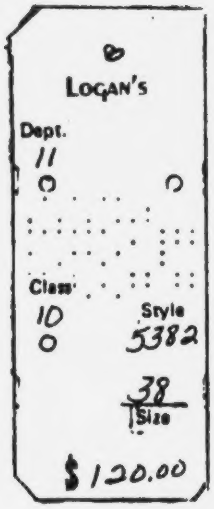
By Student Name Authorized by Sally Ross

| Style No. | Class | Article | Qty. | Old Price | New Price | Amt. of Adjustm. | Change Extension |
|---|---|---|---|---|---|---|---|
| 113K | 45 | velvet smoking jackets | 4 | 50.00 | 37.50 | 12.50 | 50.00 |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | TOTAL | 50.00 |

Why the change was necessary:

jackets are not selling --- need to move out

KEY:



LOGAN'S

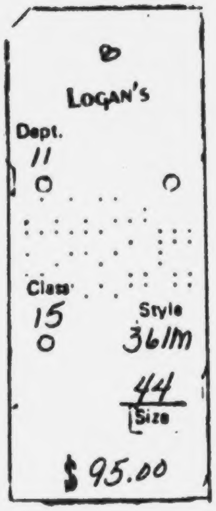
Dept. 11

Class 10

Style 5382

38 Size

$120.00



LOGAN'S

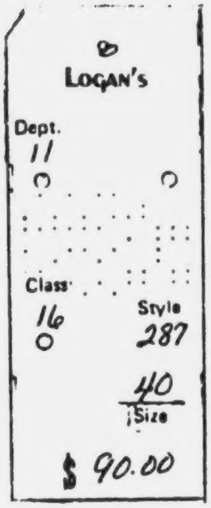
Dept. 11

Class 15

Style 361M

44 Size

$95.00



LOGAN'S

Dept. 11

Class 16

Style 287

40 Size

$90.00

**1290**

# LOGAN'S

## Retail Price Change

Store No. 3 Department No. 11 Date Sept. 10,198_

Type of Change: ___Markdown___Markup X Markdown Cancellation___Markup Cancellation

By Student Name Authorized by Sally Ross

| Style No. | Class | Article | Qty. | Old Price | New Price. | Amt. of Adjustm. | Change Extension |
|---|---|---|---|---|---|---|---|
| 5382 | 10 | wool suits | 10 | 96.00 | 120.00 | 24.00 | 240.00 |
| 361M | 15 | poly/wool suit | 14 | 76.00 | 95.00 | 19.00 | 266.00 |
| 287 | 16 | nylon/wool suit | 8 | 72.00 | 90.00 | 18.00 | 144.00 |
| | | | | | | | |
| | | | | | | | |
| | | | | | | TOTAL | 650.00 |

**Why the change was necessary:**

pre-season sale is over

# RINGING THE SALE

Using the sales tax chart given to you by your instructor, complete the transactions below, by ringing each amount, ring subtotal, add tax and ring total. Staple the receipt for each transaction to this sheet as indicated below.

TRANSACTION 1: 1 skirt @ $28.98
1 blouse @ $18.72
1 vest @ $21.98

TRANSACTION 2: 1 suit @ $87.98
2 shirts @ $16.72 ea.
1 tie @ $12.54
1 pair of socks @ $3.50

TRANSACTION 3: 1 "T" shirt @ $8.98
1 knit shirt @ $12.98
1 sport shirt @ $12.98
3 pair of jeans @ $15.54 ea.
5 pair of socks @ $1.50 ea.

TRANSACTION 4: 1 pair of shoes @ $42.77
1 handbag @ $28.32
1 bottle of polish @ $1.98

KEY:

1. Subtotal 69.68
Tax 2.79
Total 72.47

2. Subtotal 137.46
Tax 5.50
Total 142.98

3. Subtotal 89.06
Tax 3.56
Total 92.62

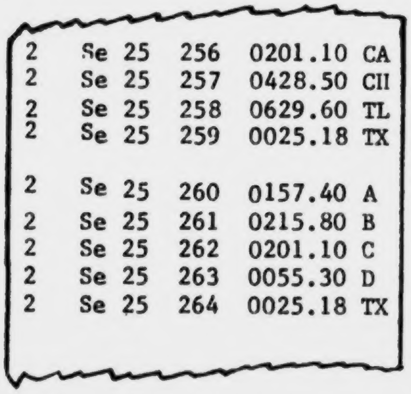
4. Subtotal 73.07
Tax 2.92
Total 75.99

# READING THE DETAIL AUDIT TAPE

It is the end of the selling day at Logan's (#3) and your manager has asked you to remove the detail audit tape from your register. Your key number is B.

Using the tape provided below and the operations bulletin on "Reading The Detail Audit Tape", answer the following questions in the spaces provided.

1. What is the date on this tape?______________________________
2. What is the total of charge sales?__________________________
3. What is the total of cash sales?____________________________
4. What is your register number?______________________________
5. Give the total sales for the day.___________________________
6. What was the total tax charged for the day?_________________
7. Give *your* sales for the day.______________________________
8. What is the transaction number for your total sales?_________



```
2   Se 25   256   0201.10 CA
2   Se 25   257   0428.50 CH
2   Se 25   258   0629.60 TL
2   Se 25   259   0025.18 TX

2   Se 25   260   0157.40 A
2   Se 25   261   0215.80 B
2   Se 25   262   0201.10 C
2   Se 25   263   0055.30 D
2   Se 25   264   0025.18 TX
```

Close out portion of the Detail Audit Tape

KEY:

1. September 25
2. $428.50
3. $201.10
4. 2
5. $629.60
6. $25.18
7. $215.80
8. 261

# LOGAN'S

# Operations Bulletin

RE: READING THE DETAIL AUDIT TAPE

Each time the cash register is used, a record of the transaction is printed on the detail audit tape (inside the cash register). At the end of the day, the register is "totaled out" in order to obtain information about the day's transactions. The following diagram will illustrate the different parts of the detail audit tape:

Register Cleared and Ready to Start the Day

```
                                                   Transaction #
              10  Ja 1   482   0000.00  TL  <- Total Sales
Register #    10  Ja 1   482   0000.00  TX  <- Tax on Sales

Date          10  Ja 1   482   0000.00  A   <- Employee Key Code
              10  Ja 1   482   0000.00  B
              10  Ja 1   482   0000.00  C
              10  Ja 1   482   0000.00  D
              10  Ja 1   482   0000.00  TX
```

Register Closed and Daily Transactions Recorded

```
10  Ja 1   552   0401.70  CA    Total Cash Sales
10  Ja 1   553   0564.10  CH
10  Ja 1   554   0965.80  TL    Total Charge Sales
10  Ja 1   555   0038.63  TX

10  Ja 1   556   0459.15  A     Total sales for
10  Ja 1   557   0362.44  B     each employee
10  Ja 1   558   0144.21  C     (reflects retail
10  Ja 1   559   0000.00  D      price plus tax)
10  Ja 1   560   0038.63  TX
```

Each transaction is recorded in the order that it occurs. Beside each transaction you will find the transaction number (to the left). The letters to the right of the amount rung indicate the type of transaction that took place. You will see voids (VO), returns (RE), no sale (NS) as well as the letters you see on the tape above. The tapes shown here represent the opening and closing only. TL reflects all sales plus tax. TX breaks out the amount of tax.

403

# OPENING CHANGE FUND

Saturday, November 5, you are working at Logan's (#3) in the Boy's Department (#11). Today your manager has asked you to obtain the opening change fund of $55.00, place it in the cash drawer, and verify the fund for register Number 10.

After obtaining the fund, you made the following count: 100-pennies, 20-nickels, 20-dimes, 12-quarters, 2-half dollars, 12-$1 bills, 4-$5 bills, and 2-$10 bills. Make the necessary notations on the opening change fund verification below:

## **LOGAN'S**
## Opening Fund Verification

| Date | Ampt. of op. fund | Dept. No. | Store No. | Register No. |
|---|---|---|---|---|
| | | | | |

| | Amount in Opening Fund | |
|---|---|---|
| Pennies | | |
| Nickels | | |
| Dimes | | |
| Quarters | | |
| Half Dollars | | |
| $1 | | |
| $5 | | |
| $10 | | |
| $20 | | |
| TOTAL | | |

Fund is ____ Even

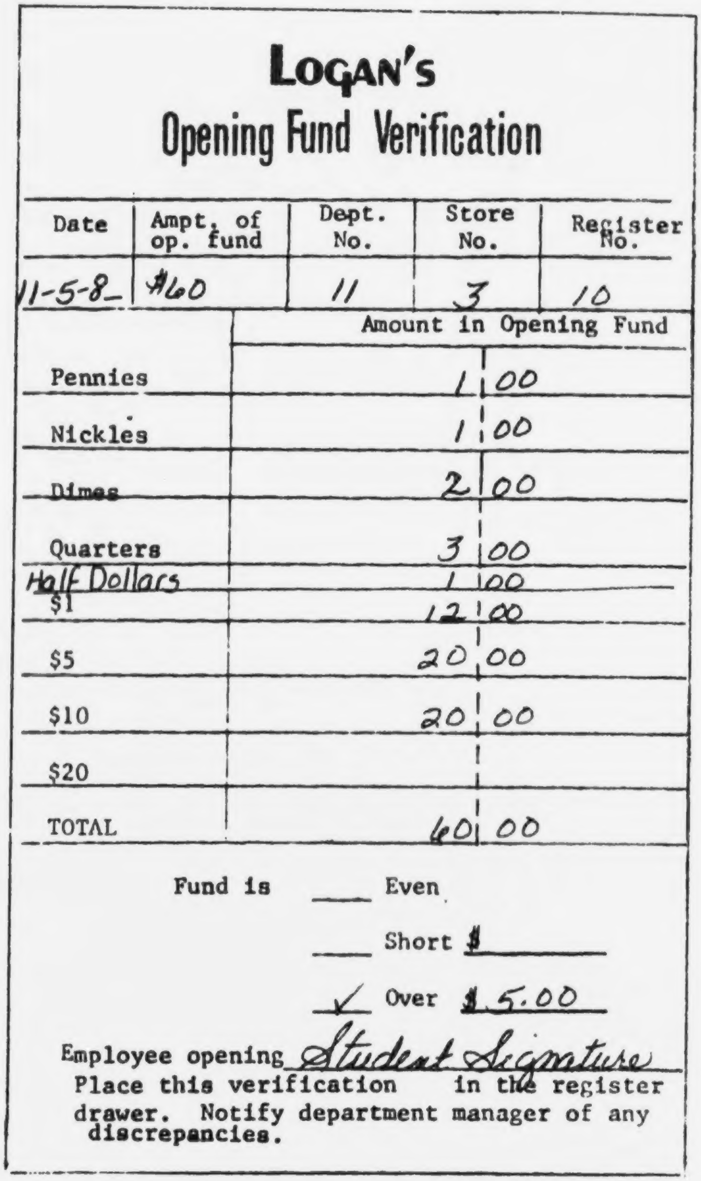
____ Short $________

____ Over $________

Employee opening________

Place this verification in the register drawer. Notify department manager of any discrepancies.

KEY:



# LOGAN'S
## Opening Fund Verification

| Date | Ampt. of op. fund | Dept. No. | Store No. | Register No. |
|---|---|---|---|---|
| 11-5-8_ | $60 | 11 | 3 | 10 |

| | Amount in Opening Fund | |
|---|---|---|
| Pennies | 1 | 00 |
| Nickles | 1 | 00 |
| Dimes | 2 | 00 |
| Quarters | 3 | 00 |
| Half Dollars | 1 | 00 |
| $1 | 12 | 00 |
| $5 | 20 | 00 |
| $10 | 20 | 00 |
| $20 | | |
| TOTAL | 60 | 00 |

Fund is ___ Even

___ Short $______

✓ Over $5.00

Employee opening Student Signature

Place this verification in the register drawer. Notify department manager of any discrepancies.

# LOGAN'S

# Operations Bulletin

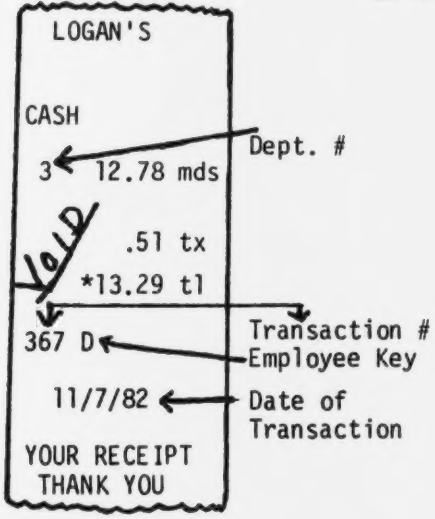
RE: VOIDS

Cash register errors are made by everyone. When they happen you need to record the errors so that they don't create even more serious problems for you and LOGAN'S.

The following is the correct procedure:

1. Mark each incorrect receipt "Void" and sign your initials.
2. Indicate the reason for the void on the Void Form.
3. The person making the void must sign the Void Form.
4. Staple the voided receipt to the back of the Void Form.
5. The department manager or other authorized person must sign the Void Form.
6. Place all Void Forms in the register cash drawer until the end of the selling day.

Below is an example of a voided register receipt. On page 42 you will find an example of a Void Form.



LOGAN'S

CASH

3 12.78 mds

.51 tx

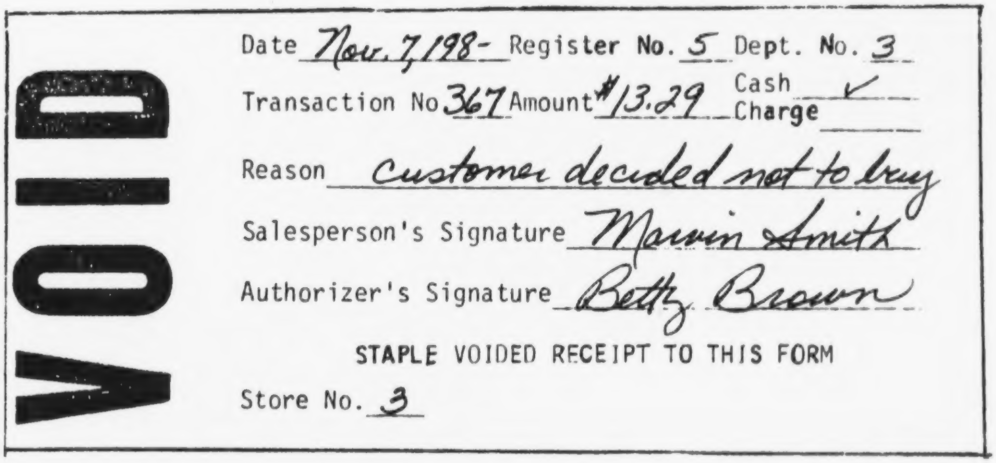
*13.29 tl

367 D

11/7/82

YOUR RECEIPT
THANK YOU

Voids are subtracted from the day's total sales and from the total sales of the employee who has committed the void.



**VOID**

Date Nov. 7, 198- Register No. 5 Dept. No. 3

Transaction No 367 Amount #13.29 Cash ✓ Charge

Reason customer decided not to buy

Salesperson's Signature Marvin Smith

Authorizer's Signature Betty Brown

**STAPLE** VOIDED RECEIPT TO THIS FORM

Store No. 3

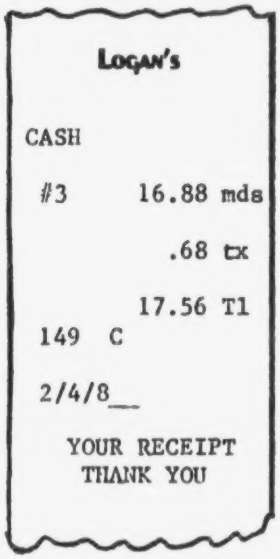
SA-29

## VOIDS

Today in the Junior Sportswear Department, a customer gave you a $20.00 bill for a sweater that costs $16.98. You ring up $16.88 in error and added $.68 tax (correct for $16.98). The customer spots your mistake and of course you re-ring the sale. Your register number is 6 and store number is 3.

Later today, you forget to add the tax to a purchase of $29.92.

The incorrect receipts are below. Obtain the void forms and operations bulletin on voids from your teacher. Properly record your errors and turn the forms in.



**LOGAN'S**

CASH

#3 16.88 mds

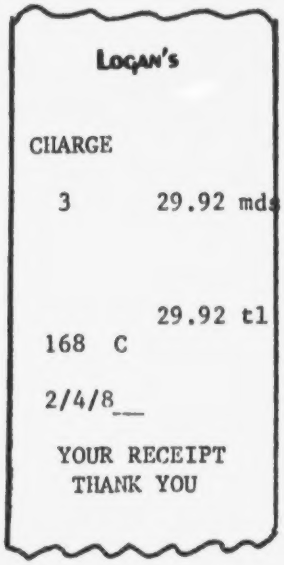
.68 tx

17.56 T1

149 C

2/4/8__

YOUR RECEIPT
THANK YOU



**LOGAN'S**

CHARGE

3 29.92 mds

29.92 tl

168 C

2/4/8__

YOUR RECEIPT
THANK YOU

**VOID**

Date ____________ Register No. ___ Dept. No. ___

Transaction No. ___ Amount ________ Cash ______ Charge ______

Reason ______________________________

Salesperson's Signature ______________________________

Authorizer's Signature ______________________________

STAPLE VOIDED RECEIPT TO THIS FORM

Store No. ___

**VOID**

Date ____________ Register No. ___ Dept. No. ___

Transaction No. ___ Amount ________ Cash ______ Charge ______

Reason ______________________________

Salesperson's Signature ______________________________

Authorizer's Signature ______________________________

STAPLE VOIDED RECEIPT TO THIS FORM

Store No. ___

KEY:

VOID

Date 2/4/8– Register No. 6 Dept. No. 3

Cash ✓

Transaction No. 149 Amount $17.56 Charge

Reason underring

Salesperson's Signature Student Signature

Authorizer's Signature Teacher Signature

STAPLE VOIDED RECEIPT TO THIS FORM

Store No. 3

---

VOID

Date 2/4/8– Register No. 6 Dept. No. 3

Cash

Transaction No. 168 Amount $29.92 Charge ✓

Reason forgot sales tax

Salesperson's Signature Student Signature

Authorizer's Signature Teacher Signature

STAPLE VOIDED RECEIPT TO THIS FORM

Store No. 3

# LOGAN'S

## Operations Bulletin

RE: ACCEPTING BANK CREDIT CARDS

Logan's will accept the following bank credit cards: American Express, Master Charge and Visa. The following conditions must be met:

1. The card must be presented.
2. The purchase must be authorized by the bank card company if the amount is over $50 for Visa and $75 for American Express and Master Charge. Write the authorization number on the sales slip. You can get the authorization by calling the bank card company. The phone numbers are placed by each phone in all departments.
3. The bank card must be current. The bank card company will not pay for purchases made with an expired card. For this reason, Logan's requires that the expiration date be circled on each bank charge slip.
4. The card must not be stolen or lost. Check the credit card companies' list of stolen or lost cards published monthly, if you do not have to call for authorization. If it is listed, it is probably stolen or lost. Notify the manager, without letting the customer know and DO NOT RETURN the card. A reward is offered for the recovery of stolen or lost cards by the bank card companies. Call for authorization anytime you are suspicious.
5. The sale must be recorded on the proper bank credit card slip, along with the card imprint. Record date, department, salesperson, merchandise, price, tax, and total.
6. The customer must sign the slip.
7. The signature must match the signature on the back of the bank card.

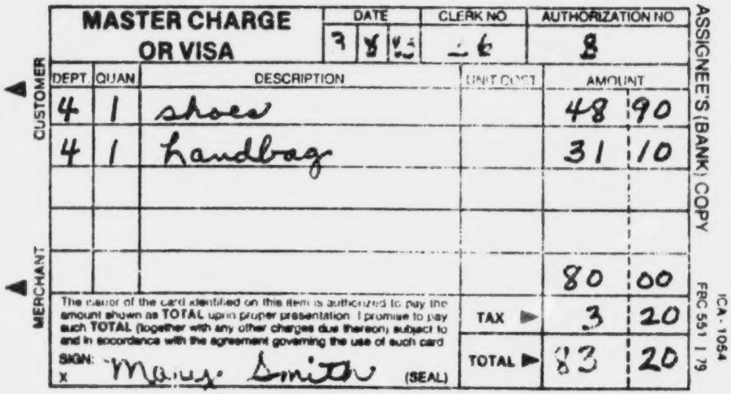
Expiration date 9-85

Mary Smith

1043 ASCB

LOGAN'S

0915680



| | | | | | |
|---|---|---|---|---|---|
| **MASTER CHARGE OR VISA** | | DATE<br>3 8 85 | CLERK NO<br>26 | AUTHORIZATION NO<br>8 | |
| DEPT | QUAN | DESCRIPTION | UNIT COST | AMOUNT | |
| 4 | 1 | shoes | | 48 | 90 |
| 4 | 1 | handbag | | 31 | 10 |
| | | | | | |
| | | | | | |
| | | | | 80 | 00 |
| The issuer of the card identified on this item is authorized to pay the amount shown as TOTAL upon proper presentation. I promise to pay such TOTAL (together with any other charges due thereon) subject to and in accordance with the agreement governing the use of such card | | | TAX ► | 3 | 20 |
| SIGN: x Mary Smith (SEAL) | | | TOTAL ► | 83 | 20 |

CUSTOMER

MERCHANT

ASSIGNEE'S (BANK) COPY

FRC 551 I 79

ICA - 1054

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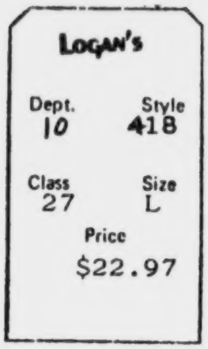
# ACCEPTING BANK CREDIT CARDS

As an employee for Logan's, who has just received the operations bulletin on Accepting Bank Credit Cards, answer the following:

1. Mrs. Teal, a well-known customer, wants to purchase a $250 Bill Blass dress, on her American Express Credit card.
    a. Do you need authorization on this sale?____________________
    Why?______________________________________
    b. Her card has expired, but she says her new one is in the mail.
    Can you accept this?______________________________
    Why?______________________________________
2. A nervous customer presents a Visa card for the purchase of a $25.00 shirt. You do not feel that the signatures on the sales slip and the card are similar. What can you do?
    ____________________________________________
    ____________________________________________
3. Mr. David G. Furman is purchasing a red and blue polo shirt with his Master Card. List the steps that you should take to approve this card:
    ____________________________________________
    ____________________________________________

    The card is below. Fill it out correctly using the following information: address-1980 Chelsea Drive, Charlotte, NC 28209; card number-1133 ESBC; expiration date-11-85. Your salesperson's number is 136, and the date is February 2.



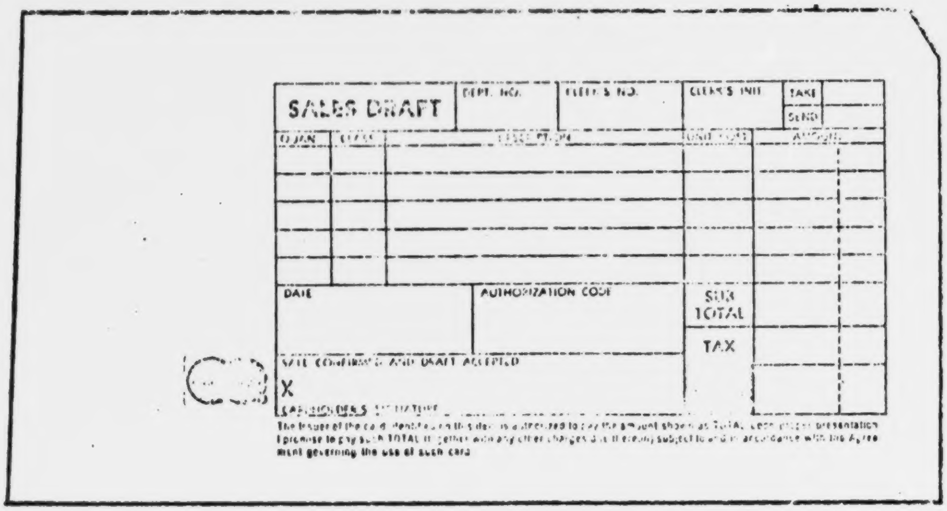
**LOGAN'S**

Dept. 10 Style 418

Class 27 Size L

Price $22.97

Price Tag
for
Polo Shirt


SALES DRAFT
DEPT. NO.
CLERK'S NO.
CLERK'S INIT.
TAKE
SEND
DESCRIPTION
DATE
AUTHORIZATION CODE
SUB TOTAL
TAX
X
CARDHOLDER'S SIGNATURE

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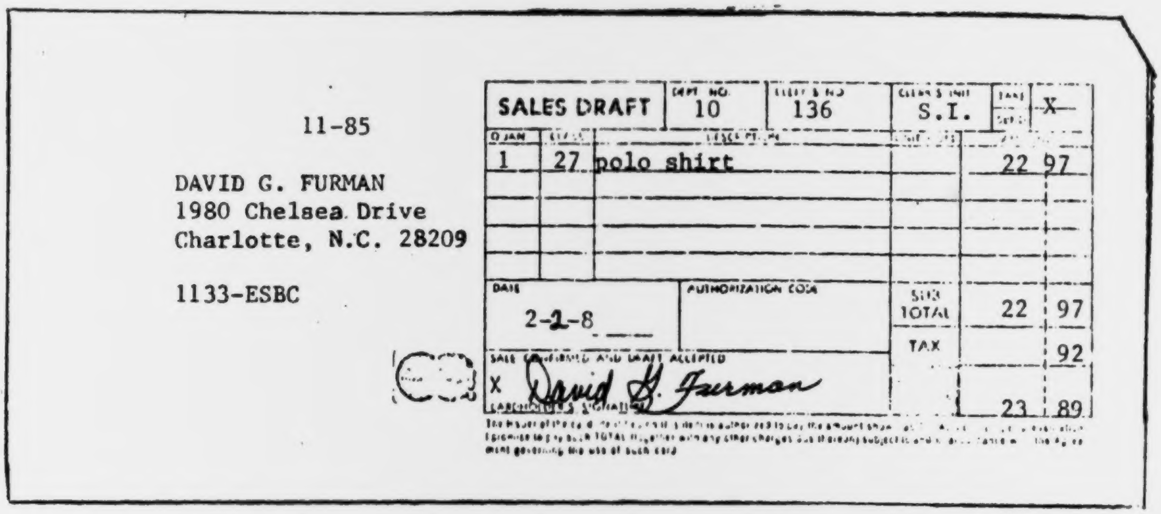
KEY:

1. a. Yes
   Bank card company requires it and if it isn't authorized and there is a problem, it becomes the store's responsibility.
   b. No
   If card is expired the bank card company won't pay for the purchase.
2. Check the list of lost or stolen cards and if it doesn't show there call the bank card company for authorization and also ask for more identification.
3. (1) Ask for the card, (2) Check and circle the expiration date, (3) Check list of lost and stolen cards.



11-85

DAVID G. FURMAN
1980 Chelsea Drive
Charlotte, N.C. 28209

1133-ESBC

| SALES DRAFT | DEPT. NO.<br>10 | CLERK & NO.<br>136 | CLERK'S INIT.<br>S.I. | TAKE / SEND | X |
|---|---|---|---|---|---|
| QUAN. | CLASS | DESCRIPTION | UNIT PRICE | AMOUNT | |
| 1 | 27 | polo shirt | | 22 | 97 |
| DATE<br>2-2-8 | | AUTHORIZATION CODE | SUB TOTAL | 22 | 97 |
| | | | TAX | | 92 |
| SALE CONFIRMED AND DRAFT ACCEPTED<br>X David G. Furman<br>CARDHOLDER'S SIGNATURE | | | | 23 | 89 |

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## Unit V - Merchandising Operations

HO-1 Stockkeeping Duties
HO-2 Merchandise Protection In Stocking - IDECC, Operations, LAP 12, #697-B
HO-3 Want Slips
HO-4 Housekeeping Duties
HO-5 Closing Procedures
HO-6 Transportation Modes
HO-7 Factors In Selecting Transportation Modes
HO-8 Checking Incoming Merchandise
HO-9 Purchase Order
HO-10 Freight Bill
HO-11 Checking the Forms
HO-12 Checking the Invoice
HO-13 Tracing a Shipment
HO-14 Tracer Request Form, IDECC, Operations, LAP 6, #643-A, HO-1&2
HO-15 Loss & Damage Claim, IDECC, Operations, LAP 6, #642-D, HO-10
HO-16 Price Ticket Information
HO-17 Computing Change
HO-18 Voids
HO-19 Logan's Charge Cards
HO-20 Taking Inventory

TM-1 Model Stock Plan

# LOGAN'S

# Operations Bulletin

RE: STOCKKEEPING DUTIES TO BE PERFORMED BY SALES PERSONNEL

Good stockkeeping procedures are necessary if we are to:
- maintain our image of a well-organized, well-run organization
- be knowledgeable of merchandise levels
- reduce losses from damaged and stolen merchandise

The following duties should be carried out by all sales personnel daily:

1. Receive, check, mark and sort newly arrived merchandise.
2. Arrange merchandise neatly on the sales floor according to store policy.
3. Straighten racks several times a day. All hangers should be turned in the same direction, all merchandise should be hanging straight, all buttons buttoned, all zippers zipped, bows tied, belts buckled, cuffs turned right, etc.
4. Straighten tables and bins several times a day. Items should be neatly stacked and placed in the proper groupings according to store policy.
5. Replinish merchandise from reserve stock when there is a reserve stock for such items as hosiery, jeans, pajamas, etc.
6. Check price tickets and replace any that are missing.
7. Rotate appropriate stock such as hosiery, socks, boxed or packaged lingerie and men's underwear.
8. Remove from forward stock damaged merchandise. Repair or renew, if possible, and replace in forward stock.
9. Steam or iron merchandise that is badly wrinkled.
10. Guard against damage by displaying correctly, protecting from sun and strong lighting, careful stacking and covering expensive items.
11. Guard against stock shrinkage by keeping merchandise in the proper areas and arranged neatly so that salespeople can easily tell what should be in definite places. Merchandise that has fallen on the floor or been left in the dressing room can more easily be taken by a dishonest customer.
12. Fill out want slips as necessary.
13. Advise buyer or manager of merchandise needs verbally and/or in a written report.

# LOGAN'S

# Operations Bulletin

RE: WANT SLIPS

When customers ask for merchandise that the store does not have in stock, sales are lost. To minimize lost sales, Logan's buyers must find out what merchandise was needed and not found by customers. Because most of our buyers don't work regularly with customers, they must rely on our salespeople to tell them about customer requests for out-of-stock merchandise.

Logan's asks our salespeople to use customer "want slips" to record information about unavailable styles, colors, price lines, or items that customers have requested. Want slips are one of the few indications Logan's has of what customers would buy if we had it available. Our Dress Department, for instance, might stock only conservative styles in sizes 18-20. Want slips might show that customers wearing these sizes would like to find more lively and youthful styles from which to choose.

Want slips are valuable and the time spent filling them out is important because 1) they alert the buyer to the stock conditions, 2) they record customer preferences, and 3) they keep salespeople alert to the customer needs. It is necessary that salespeople realize the true value of want slips. Below you will find an example of a properly filled out want slip.

**SEND TO OFFICE AT ONCE**

## WANT SLIP

Salesperson Beth Dependable Date 12/15/82 Store No. 2 Dept. No. 5

Code: SO - special order OS - out of stock

| Code | Description(item,color,size,price) | No. of requests | Customer name & address if special order |
|---|---|---|---|
| OS | jumpsuit, black, size 10 | 1 | |
| SO | Regency Wool skirt, camel, size 8, $38.66 | 1 | Dean Caldwell<br>127 Selwyn Ave. |

| The following stock is low: Vendor, style, color, price | No. of pieces in stock |
|---|---|
| J. G. Hooke blazer, navy, style 487, $125.00 | 2 |
| | |

SUGGEST A SUBSTITUTE

# LOGAN'S

# Operations Bulletin

RE: HOUSEKEEPING DUTIES TO BE PERFORMED BY ALL SALES PERSONNEL

## DAILY

1. Dust all furniture, fixtures, and ledges.
2. Clean mirrors and glass.
3. Sweep areas that are not carpeted and in the selling area.
4. Vacuum all carpets.
5. Pick up trash left by customers and empty garbage cans.
6. Polish chrome.

In the space below, add other duties that you learned about from the interviews.

## WEEKLY

1. Wash plants and water them.
2. Wax rods so that the hangers will slide easily. This is usually done with wax paper or a spray wax.
3. Dust baseboards and dressing rooms.
4. Sweep and mop storage and office areas.
5. Clean bathroom.
6. Move fixtures and vacuum.

In the space below, add other duties that you learned about from the interviews.

# LOGAN'S

## Operations Bulletin

RE: CLOSING PROCEDURES

The employee in charge of closing the department at the end of the selling day should use the following check list:

_____1. Pick up all trash left in the department.

_____2. Check dressing rooms and put all merchandise found back into forward stock.

_____3. Put any "hold" merchandise that has not been picked up in forward stock.

_____4. Rack all hangers not being used, and move to the storage room.

_____5. Put out a supply of Logan's bags for the next day.

_____6. Check for a proper supply of charge slips, sales tickets, bank charge forms and return forms. Replinish if necessary.

_____7. Take all sensomatic tags to the storage room.

_____8. Take any unclaimed items to lost and found (located in Personnel Office).

_____9. Write-up defective merchandise.

____10. Close-out cash register.

## TRANSPORTATION MODES

| Type of Carrier | Cost | Speed of Shipment | Special Services Available | Reliability of Service |
|---|---|---|---|---|
| Water | inexpensive, esp. heavy, bulky goods & foreign shipments | extremely slow | | |
| Rail | economical for long-haul & carload shipments | fast for carload shipment relatively slow for short-haul & small loads | "piggyback" | very reliable for carload shipments. poor service in light traffic areas. unaffected by bad weather conditions. |
| Motor | inexpensive for short-haul in truckload lots. expensive for long-haul & high volume shippers | fast for short-haul, in truckload lots. relatively slow for long-haul shipments. | door-to-door services | can operate in light traffic areas. can be affected by bad weather conditions. |
| Air | most expensive | extremely fast | | often not available in low traffic areas. service may be affected by bad weather. |
| Parcel Post | inexpensive for small light shipments over short distances | relatively slow | insurance, C.O.D. direct delivery | loss rate is unusually high. |
| United Parcel Service | economical for small shippers. very expensive for larger shipments of goods | fast | door-to-door delivery service<br>insurance | can operate in low traffic areas. |

## FACTORS IN SELECTING TRANSPORTATION MODES

Having goods in the store at the time needed and in good condition is necessary to any retail operation. Often it will be up to the merchant to select a carrier (type of vehicle carrying the merchandise) that will best meet his/her needs. Transportation of goods is just as important as any other phase of the business. A store can have a leading fashion image, excellent products and outstanding service, but, unless shipments arrive when needed, it will soon by out of business.

While a store may rely upon one type of carrier for most shipments, the need for other carriers will arise from time to time as the circumstances dictate-therefore; full awareness of the services offered by all types of carriers is necessary.

In selecting carriers the following should be considered:

1. Time
   How soon are the goods needed.

2. Size & Weight of Goods
   Does the shipment amount to a carload or truckload? What restrictions do certain carriers have on size and weight of packages? Is the cost greatly increased by increase in weight?

3. Distance
   For short hauls some carriers cost less than others--Some carriers take too long if the distance is great.

4. Special Services Offered
   Door-to-door delivery, insurance, free pick-up, etc.

The retailer must weigh the advantages and disadvantages of each carrier and apply them to a specific situation.

# LOGAN'S

# Operations Bulletin

RE: CHECKING INCOMING MERCHANDISE

When merchandise comes into Logan's, it is usually accompanied by an invoice (the bill) and a packing slip. Before the merchandise can be made available for sale, it must be unpacked and checked for damage and the items counted. The quantity received must be checked against the invoice.

The buyer's purchase order must be checked to see that the shipment is in agreement. All arithmetic calculations on the invoice must be checked. To do such work efficiently, you must understand the forms used and be able to perform the required calculations.

## Forms Used

The invoice is a form that lists among other things 1) the number of items shipped, 2) a description of the items, 3) the price charged, 4) the terms and 5) the amount owed. Study the invoice below and compare it to the purchase order.

## TOP of the LINE 7892

1984 Seventh Avenue
New York, New York 10014

Sold To:
LOGAN'S

No. pieces shipped: 1
Weight: 19 lbs.

Order No. 8365
Dept. No. 2
Date October 29, 19--
Terms 8/10 EOM
Via: Rainwater Transfer

| Quantity | Style No. | Description | Unit Cost | Extension |
|---|---|---|---|---|
| 15 | 609 | wool cowl neck-basic sweater | 15.00 | 225.00 |
| 20 | 876 | sweater vests | 12.00 | 240.00 |
| 10 | 744 | boat neck cable sweater | 22.00 | 220.00 |
| | | | | |
| | | | Total | 685.00 |

seam ripped open on box M.D.

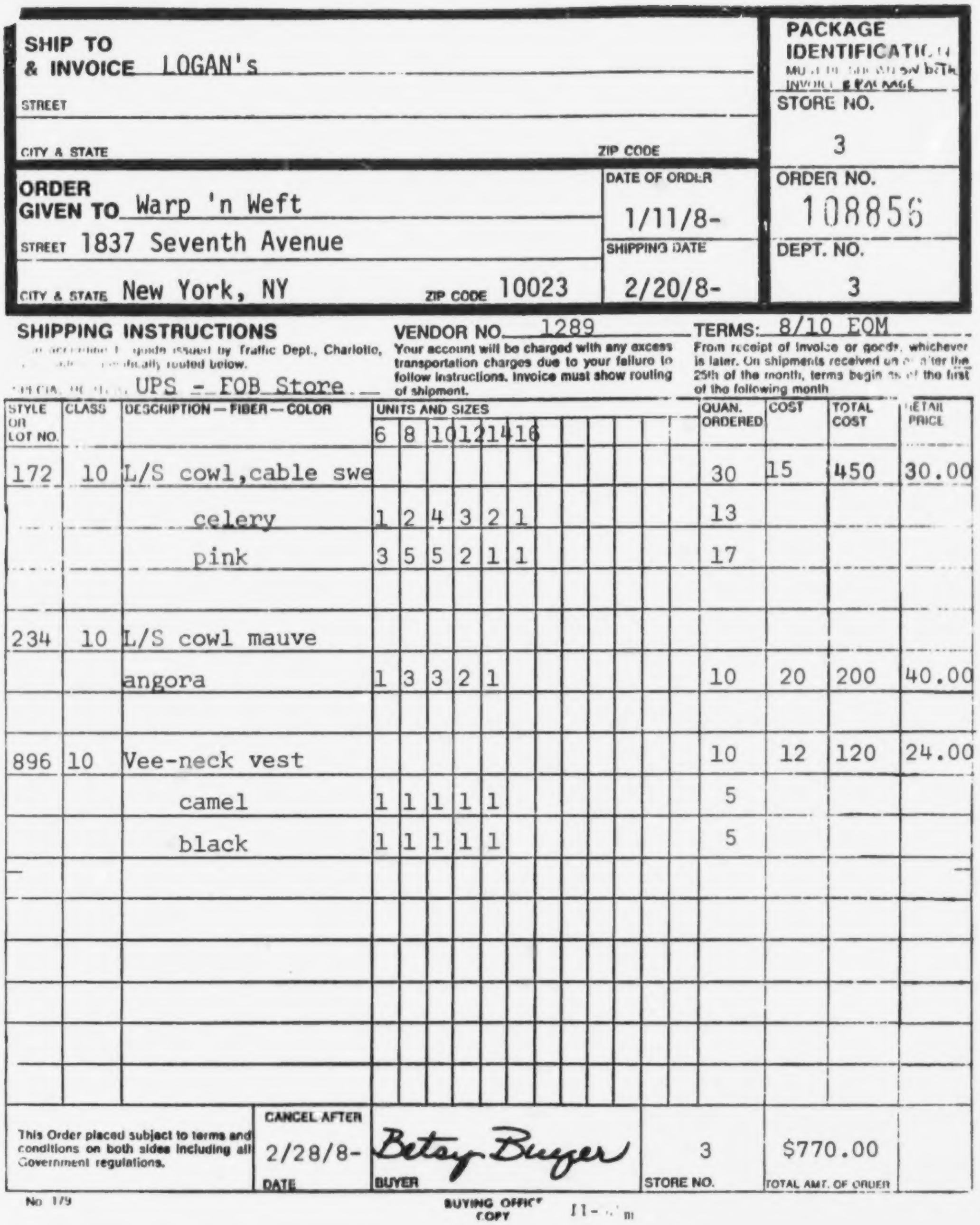
Returns and Claims: None accepted after 10 days from receipt of goods

Less Discount 54.60
Discount 8%
AMOUNT DUE $630.20

# LOGAN'S

# Operations Bulletin

The purchase order is filled out by the buyer when the merchandise is ordered from the vendor. The buyer keeps a copy on file and sends a copy to the receiving area. Purchase orders vary greatly in appearance but contain the same information.



**SHIP TO & INVOICE** LOGAN's
STREET
CITY & STATE
ZIP CODE

**PACKAGE IDENTIFICATION**
MUST BE SHOWN ON BOTH INVOICE & PACKAGE
STORE NO. 3

**ORDER GIVEN TO** Warp 'n Weft
STREET 1837 Seventh Avenue
CITY & STATE New York, NY
ZIP CODE 10023

DATE OF ORDER 1/11/8-
SHIPPING DATE 2/20/8-
ORDER NO. 108856
DEPT. NO. 3

**SHIPPING INSTRUCTIONS**
In accordance with guide issued by Traffic Dept., Charlotte, unless specifically routed below.
SPECIAL ROUTING UPS - FOB Store

VENDOR NO. 1289
Your account will be charged with any excess transportation charges due to your failure to follow instructions. Invoice must show routing of shipment.

TERMS: 8/10 EOM
From receipt of invoice or goods, whichever is later. On shipments received on or after the 25th of the month, terms begin as of the first of the following month

| STYLE OR LOT NO. | CLASS | DESCRIPTION — FIBER — COLOR | UNITS AND SIZES 6 | 8 | 10 | 12 | 14 | 16 | QUAN. ORDERED | COST | TOTAL COST | RETAIL PRICE |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 172 | 10 | L/S cowl,cable swe | | | | | | | 30 | 15 | 450 | 30.00 |
| | | celery | 1 | 2 | 4 | 3 | 2 | 1 | 13 | | | |
| | | pink | 3 | 5 | 5 | 2 | 1 | 1 | 17 | | | |
| 234 | 10 | L/S cowl mauve | | | | | | | | | | |
| | | angora | 1 | 3 | 3 | 2 | 1 | | 10 | 20 | 200 | 40.00 |
| 896 | 10 | Vee-neck vest | | | | | | | 10 | 12 | 120 | 24.00 |
| | | camel | 1 | 1 | 1 | 1 | 1 | | 5 | | | |
| | | black | 1 | 1 | 1 | 1 | 1 | | 5 | | | |

This Order placed subject to terms and conditions on both sides including all Government regulations.

CANCEL AFTER 2/28/8- DATE
Betsy Buyer BUYER
3 STORE NO.
$770.00 TOTAL AMT. OF ORDER

No 179
BUYING OFFICE COPY

Operations
48.10 422

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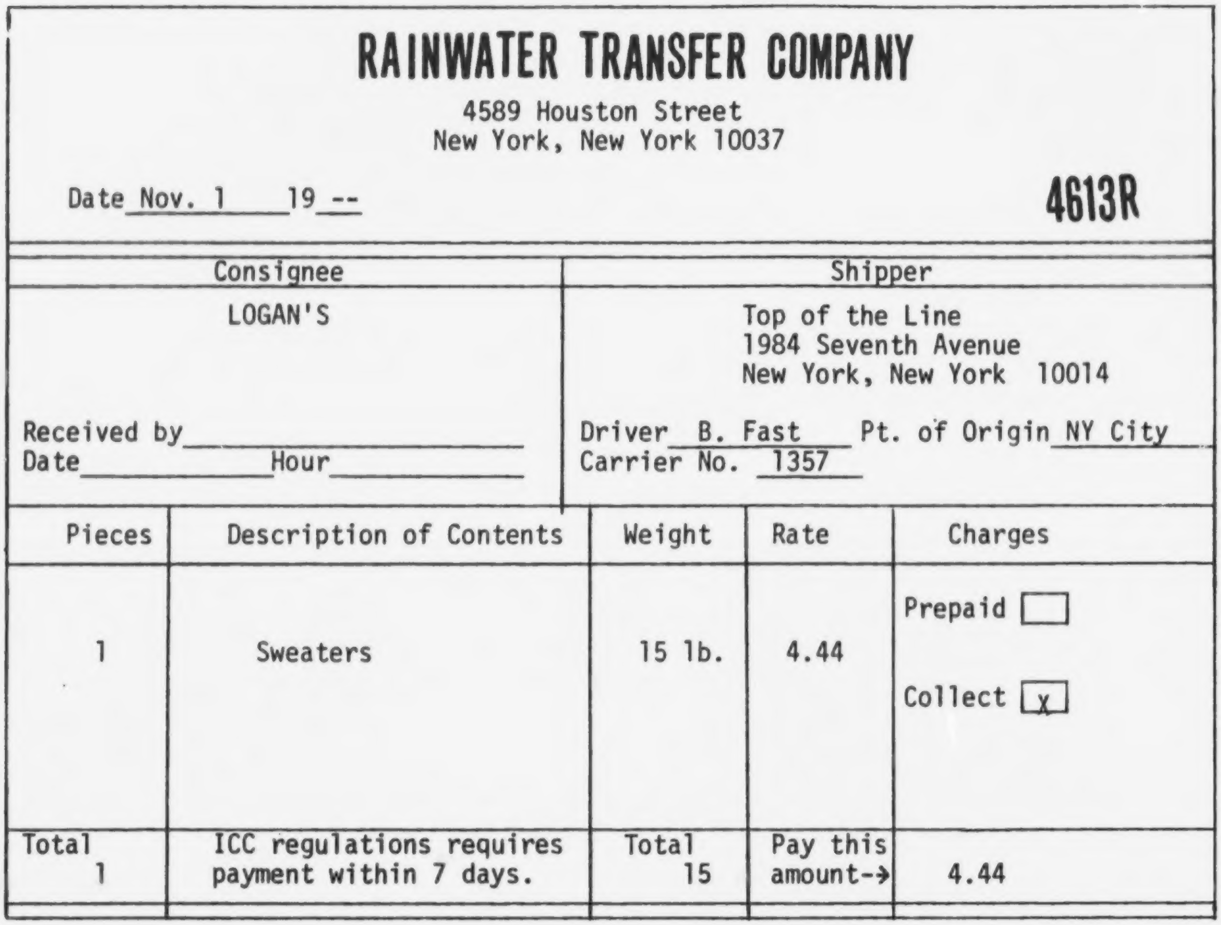
# LOGAN'S

## Operations Bulletin

Another kind of form that arrives with the merchandise is the Freight Bill (often called Waybill). It is written by the transport company. Both the invoice and the freight bill are used to trace merchandise if it goes astray.



### RAINWATER TRANSFER COMPANY

4589 Houston Street
New York, New York 10037

Date Nov. 1 19 --

**4613R**

| Consignee | Shipper |
|---|---|
| LOGAN'S | Top of the Line<br>1984 Seventh Avenue<br>New York, New York 10014 |
| Received by ________<br>Date ______ Hour ______ | Driver B. Fast Pt. of Origin NY City<br>Carrier No. 1357 |

| Pieces | Description of Contents | Weight | Rate | Charges |
|---|---|---|---|---|
| 1 | Sweaters | 15 lb. | 4.44 | Prepaid ☐<br>Collect ☒ |
| Total<br>1 | ICC regulations requires payment within 7 days. | Total<br>15 | Pay this amount→ | 4.44 |

It is the policy at Logan's not to open and check packages until all papers dealing with the order (the purchase order, the invoice and the freight bill) are all together and available for checking. Any one of these that have been misplaced could mean several days delay in getting the goods on the sales floor.

# LOGAN'S

# Operations Bulletin

## Checking the Forms

Listed below is some information you may need to help you understand the freight bill:

CONSIGNEE - the person or business receiving the merchandise

SHIPPER - the vendor or person sending the merchandise

RECEIVED BY - name of the person receiving the merchandise

DATE AND HOUR - when the shipment was received

DRIVER - name of the truck driver

PT. OF ORIGIN - Place where vendor handed goods over to the carrier

CARRIER NO. - number assigned to the truck

PIECES - the number of cartons, boxes, etc. in which the order is packed

WEIGHT - given in lbs.

RATE - charge for carrying the pieces from the vendor to the purchaser

PREPAID - the vendor paid for transportation charges

COLLECT - the store pays for the transportation charges

When receiving merchandise, you should make the following checks with the freight bill:

1. Confirm that Logan's is the consignee and that you have a purchase order from the buyer and an invoice. Place a check (✓) by Consignee to show that you have made this confirmation.

2. Check to see if you have been given the right number of pieces. Place a check mark by the number of pieces if they are correct.

3. Examine the boxes to see if they seem to be in good condition (look for wet, broken or otherwise damaged boxes or boxes that sound as if they contain something broken. Note any problem on the freight bill.

4. Problem boxes should be opened and the contents inspected. DO NOT accept merchandise that is damaged until an inspector from the transportation company arrives and makes a report.

HO-12

# LOGAN'S

## Operations Bulletin

Study handout number 8. You should make the following checks on the invoice (using the purchase order only for reference):

Check 1: Unpack the merchandise, count it and compare the number of items received with the quantity shown on the invoice. You should check the quantity by using a direct check (using the invoice, look to see how many items you are to receive and then count to see if you actually received that amount). Occassionally your manager may ask you to make a blind check (make without knowledge of the amounts you are supposed to receive - you count, record amounts and later compare your count with the invoice). As each item count is compared with the quantity figure on the invoice, a check mark (✓) is made on the invoice if the two numbers agree. The check mark should be placed directly after the quantity figure on the invoice. Shortages or overages should be noted on the invoice by marking out the original amount and writing in amount you actually counted.

| Quantity | Style No. | Description |
|---|---|---|
| 15✓ | 609 | wool cowl neck-basic sweater |
| 20✓ | 876 | sweater vests |
| ~~10~~ 9 | 744 | boat neck, cable sweater |

Check 2: Compare the buyer's purchase order with the invoice to be sure that the quantity, item and the price charged on the invoice agrees with the buyer's order. As you make these comparisons, place a check mark after the unit price column on the invoice to show that it has been checked with the buyer's order and matches it. Discrepancies should be indicated by marking through the original amount on the invoice and writing the correct amount. This alerts management to investigate the discrepancy.

| Description | Unit Cost |
|---|---|
| wool cowl neck-basic sweater | 15.00 ✓ |
| sweater vests | 12.00 ✓ |
| boat neck, cable sweater | 22.00 ✓ |

Even if the manufacturer is unable to ship all the items listed on the purchase order, it is common practice for him to list the missing items on the invoice. In place of a unit price, however, he indicates why the item cannot be shipped. He will usually use "BO" for back order, which means that the item will be shipped at a later date. "OS" stands for out of stock and indicates that the item will probably not be shipped.

Check 3: Verify the arithmetic calculations on the invoice. As you check each calculation, place a check mark after the figure in the extension column, if it is correct. If you find an error, draw a single line through the incorrect figure and write the correct figures in pencil on the invoice. Bring the error to the attention of your manager.

| Unit cost | Extension |
|---|---|
| 15.00 | 225.00 |
| 12.00 | 240.00 |
| 22.00 | 220.00 |
| Total ckd by S.P. | 685.00 |
| Less discount<br>discount at 8% | 54.60 |
| AMOUNT DUE | $630.20 |

Check 4: Inspect each piece of merchandise for physical damage. It is not necessary to make any notations about this check on the invoice, but any damages should be called to the attention of your manager.

After you have made the 4 checks, place your initials on the invoice to indicate that you have checked it.

# LOGAN'S
# Operations Bulletin

RE: TRACING A SHIPMENT

If a shipment does not arrive when due, it may be necessary to trace the shipment. This means to follow it in an effort to find out where it is presently.

In the case of a known loss where merchandise has been ordered by a store and not received by a certain date, the person should get the purchase order and contact the vendor. If the vendor says that the order was shipped, the person should ask what mode was used, the date of shipment and the bill of lading number. With this information, the person can contact the carrier and trace the location of the merchandise, using a tracer request form.

When the carrier's agent receives the tracer request, he dispatches a tracer over the route of the shipment. The carrier's agent notifies the consignee that the shipment has been located and gives the expected time of delivery and the reasons it has been delayed.

If a shipment connot be located within a reasonable time, the standard claim form will be filed by the consignor in case of F.O.B. store or the consignee in case of F.O.B. factory.

# TYPES OF INFORMATION ON A PRICE TICKET

I. Information Most Often Used by the Customer:

*A. Size

*B. Price

*C. Store name

II. Information Most Often Used by the Sales Force or Management:

A. Branch number

B. Department number

C. Vendor number

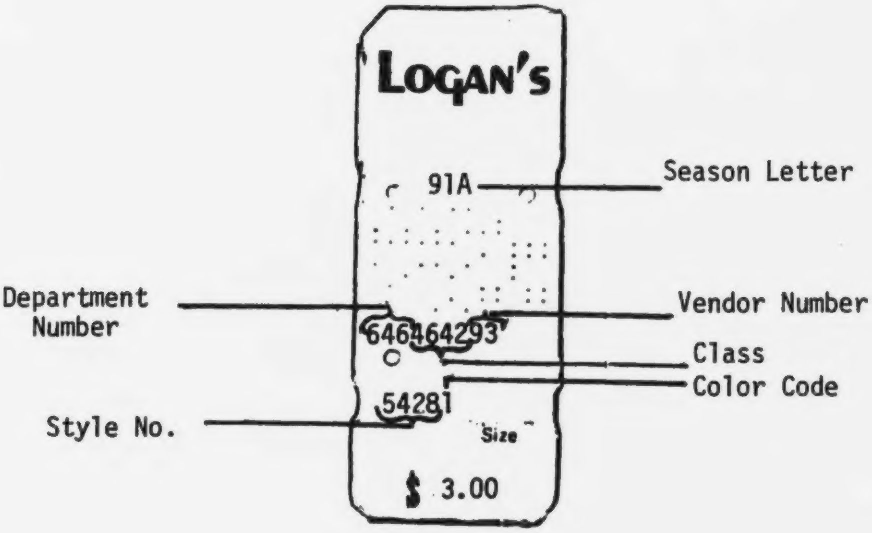
*D. Style number

*E. Class

*F. Season Letter

G. Cost Code

H. Color Code


LOGAN'S
91A
Season Letter
Department Number
646464293
Vendor Number
Class
Color Code
54281
Style No.
Size
$ 3.00

* found on almost all apparel price tickets

HO-17

# LOGAN'S

# Operations Bulletin

RE: COMPUTING CHANGE AND RETURNING IT TO THE CUSTOMER

Logan's has two types of cash registers. One computes the change automatically (placed in heavy traffic departments) and the other does not compute the change to be returned. Since most employees work in more than one department at times, it is necessary that you be knowledgeable of Logan's procedure for counting change in both situations.

Following is the procedure required of all salespeople at Logan's:

A. Making Change Manually and Returning It to the Customer.

1. When a customer's purchase has been totaled on the register, the salesperson will say, "That will be $24.51, Mrs. Jones."
2. Place the amount tendered on the change plate.
3. Call back to the customer the total of the sale and the amount tendered. "That will be $24.51 out of $30.00."
4. Count the change from the drawer carefully, beginning with the amount of the sale and ending with the amount tendered. If the customer gives you $25.00 for payment and the cost is $24.51, the change returned to the customer is counted: $24.51, 24.52, 24.53, 24.54, 24.55, 24.65, 24.75, 25.00. USE AS FEW COINS AS POSSIBLE.
5. Count the change into the customer's hand. Mention each dollar denomination individually to prevent skipping a dollar. Do not place the change on the counter.
6. Place the money tendered by the customer in the proper compartment or compartments in the cash drawer. CLOSE THE DRAWER IMMEDIATELY to prevent a dishonest customer from slipping money if your attention is taken with something else.
7. Give the customer the receipt. At Logan's the receipt is placed in the customer's bag.
8. When the sale is satisfactorily completed, thank the customer. "Thank you Mrs. Jones, I know you will enjoy your new blouse."

EXAMPLE: "Mrs. Jones, that will be $5.58 out of $20.00."

| Give to Mrs. Jones: | Say to Mrs. Jones |
|---|---|
| | $5.58 |
| 2 pennies | 5.60 |
| 1 nickel | 5.65 |
| 1 dime | 5.75 |
| 1 quarter | 6.00 |
| 4 $1 | 10.00 |
| 1 $10 | 20.00 |

B. Returning Change to the Customer When It Is Computed Automatically:

1. Announce the total.
2. Place amount tendered on the change plate.
3. Depress the amount tendered key. Call back to the customer the total of the sale, amount tendered, and the amount of change. "That will be $5.20 out of $10.00. Your change is $4.80."
4. Count the change from the drawer, beginning with the highest denomination. 1 dollar, 2 dollars, 3 dollars, 4 dollars, 4.50, 4.75, 4.80.
5. Count the change into the customer's hand. Mention each dollar denomination individually.
6. Place money tendered in the proper compartment and CLOSE THE DRAWER.
7. Place the receipt in the customer's bag.
8. Thank the customer.

EXAMPLE: "That's $4.22 out of $10.00, Mrs. Jones. Your change is $5.78."

| Give to Mrs. Jones | Say to Mrs. Jones |
|---|---|
| 1 $5 bill | $5.00 |
| 1 half dollar | 5.50 |
| 1 quarter | 5.75 |
| 3 pennies | 5.78 |

Making change is an integral part of your job. You must perform this responsibility with accuracy and skill. Practice making change, so that you will have confidence in your ability.

# VOIDS

Cash register errors are made by everyone. When they happen you need to record the errors so that they don't create even more serious problems for you and your store.

Two common errors that are made are over rings and under rings. Over rings happen when an item is recorded on the register for more that it is priced. Generally, over rings must be voided. This is generally done by writing VOID on the cash register receipt, signing the receipt, indicating the reason for the void, and perhaps having someone in management verify the void. The receipt is then placed in the register and the correct amount re-rung. Under rings occur when an item of merchandise is recorded on the register for less that it is priced. This can be handled by computing the difference and ringing it separately or by voiding as above and re-ringing the sale. The last method is generally preferred so that the customer's ticket and the merchandise that was actually bought will agree. Of course, there are other errors, like hitting the wrong department number key, etc.

All businesses do not handle register errors the same way. A very small business which is run by the owner and does not answer to a home office, may have no definite procedure for correcting errors. The salesperson who makes the mistake may simply forget the error and begin again. Larger businesses cannot operate under this system. Their registers are read daily and sales figures are compiled from the information on the tape.

# LOGAN'S

# Operations Bulletin

RE: ACCEPTING LOGAN'S CHARGE CARDS

LOGAN'S Charge Customers are the backbone of our business. It is our responsibility to help protect the Charge Customer, as well as ourselves, by attempting to assure that only the proper people will use the charge cards that we have issued.

The following procedure will help insure that stolen cards do not get used:

1. Request the customer's charge card for every charge purchase. If the customer does not have the card with them, you must require a written identification such as a driver's license. Call our credit department (ext. 69) to authorize this charge. Ask the credit office for the account number, name and address and write it on the sales ticket. Be sure that the information on the written identification agrees with the information in the credit office.

2. For purchases over $50, call the credit department to authorize the charge. This "floor limit" helps keep a check on large purchases and keeps the salesperson in touch with the credit department which will be aware of all cards reported stolen or lost.

3. If a purchase is not authorized, politely explain to the customer that they should visit the credit department upstairs for an explanation. This must be handled tactfully, noting that the mistake could be the store's and that you are sorry for the inconvenience. Hold any merchandise until authorized by the credit department to complete the sale. DO NOT take the customer's word that "everything is straightened out."

4. Obtain the customer's signature on the sales ticket. There are two reasons why this must be done. First, by law, the customer is not required to pay for a purchase if the charge slip is not signed by the customer. Second, this gives you a chance to compare the signature on the sales ticket with the one on the back of the charge card. If there is a very obvious difference in handwriting, quietly call your manager and tactfully detain the customer. DO NOT RETURN THE CARD.

# TAKING INVENTORY

Most stores keep two kinds of inventory (based on the way that it is taken):

1. Perpetual (also called running or book)
2. Physical (sometimes called periodic)

A perpetual inventory is a "running" inventory -- one that is kept daily using records of each department. It is not based on what is actually left in the department, but what the records say has been sold, returned to the vendor, transferred, etc. This inventory is really the "count on the books."

Most apparel businesses make a physical count of the merchandise on hand, at least twice a year. This count is compared with the "count" on the books. Each item in stock is counted during a physical inventory and the items are recorded on a form, along with its cost or retail price. An inventory of this type is necessary in order that the business may determine what is actually in stock and the amount of stock shrinkage that has occurred. Some stores make an abbreviated count monthly of only specific classes of merchandise for reorder purposes -- others rely on their perpetual inventory records for reorder.

Inventory records are kept by:

1. Units (number of actual items)- This is called unit control.
2. Dollars (how much the merchandise is worth)- Called dollar control - Today's businesses most often keep their records by the retail price, but a few small stores still record all items at cost.

Because an actual count must be made of each item in stock, businesses usually take a physical inventory at the end of a season when stock is low. For most fashion retailers, this time would be just after the Christmas season. A ski shop might take its inventory in June, however. A shop in a summer resort area, might take its inventory in October or November. Usually, a business runs a pre-inventory sale to further reduce its merchandise.

A form on which the quantity, description and price of items in stock are recorded periodically for a physical inventory is known as an inventory sheet. These forms vary depending upon the type of merchandise you are listing. The inventory sheets provide a check of each step to ensure a high level of accuracy. Usually, one person counts the items and calls them off to another person, who lists them on the inventory sheet. Different persons must initial the form. Each initial certifies that a certain portion of the work has been checked and rechecked.

Before taking inventory a department should:

1. Inspect price tags, replace all torn, illegible or missing tags.
2. Locate all out-of-department merchandise.
3. Group merchandise by department, class, price and season.
4. Check merchandise for soils and damages.
5. Manager should see that all markdowns have been taken.
6. Stockrooms should have merchandise arranged in a countable order.

# LOGAN'S

## MODEL STOCK PLAN

| Class | Style | Price Line | Color | Sizes | | | |
|---|---|---|---|---|---|---|---|
| | | | | Small | Medium | Large | Extra-Large |
| Knit Shirts | Round neck Short sl. | 11.98 | solid basic | 25 | 30 | 45 | 20 |
| | | | solid fashion | 15 | 20 | 35 | 10 |
| | | | patterned basic | 30 | 40 | 50 | 25 |
| | | | patterned fashion | 25 | 30 | 45 | 20 |
| | | 14.98 | solid basic | 30 | 35 | 45 | 20 |
| | | | solid fashion | 20 | 25 | 40 | 15 |
| | | | patterned basic | 35 | 45 | 55 | 25 |
| | | | patterned fashion | 30 | 40 | 50 | 20 |
| | | 18.98 | solid basic | 10 | 15 | 20 | 10 |
| | | | solid fashion | 8 | 12 | 15 | 5 |
| | | | patterned basic | 12 | 18 | 25 | 10 |
| | | | patterned fashion | 8 | 10 | 15 | 5 |
| | Collars short sl. | 13.98 | solid basic | 15 | 20 | 35 | 10 |
| | | | solid fashion | 8 | 15 | 25 | 7 |
| | | | patterned basic | 15 | 20 | 35 | 10 |
| | | | patterned fashion | 10 | 18 | 30 | 6 |
| | | 19.98 | solid basic | 15 | 20 | 35 | 10 |
| | | | solid fashion | 10 | 15 | 25 | 5 |
| | | | patterned basic | 12 | 25 | 30 | 8 |
| | | | patterned fashion | 8 | 12 | 20 | 5 |
| | | 25.98 | solid basic | 5 | 10 | 15 | 3 |
| | | | solid fashion | 3 | 8 | 10 | 2 |
| | | | patterned basic | 5 | 10 | 15 | 3 |
| | | | patterned fashion | 3 | 8 | 10 | 2 |
| | Tank tops | 9.98 | solid basic | 15 | 20 | 25 | 10 |
| | | | solid fashion | 8 | 12 | 15 | 5 |
| | | | patterned basic | 10 | 15 | 20 | 10 |
| | | | patterned fashion | 5 | 10 | 15 | 3 |
| | | 12.98 | solid basic | 10 | 15 | 20 | 8 |
| | | | solid fashion | 7 | 10 | 15 | 5 |
| | | | patterned basic | 10 | 15 | 20 | 8 |
| | | | patterned fashion | 5 | 8 | 12 | 3 |

Store No. 3 Dept. No. 10

Classification Shirts Subclassification Knits

Operations
48.25

# EVALUATION MEASURES AND KEYS
## (COMPETENCY / TEST - ITEM BANK)

## TABLE OF SPECIFICATIONS FOR TEST CONSTRUCTION

**PROGRAM AREA** Marketing and Distributive Education

**SE NAME** Fashion Merchandising

UNIT Merchandising Operations

| | EXPECTED STUDENT OUTCOME | | | | % Importance | Total No. of Items |
|---|---|---|---|---|---|---|
| | Cognitive Level* | | | Performance | | |
| Competency | I | II | III | | | |
| 055. Locate stock on the selling floor and in understock or reserve stock. | | | X | | | |
| 056. Sort merchandise by department, size, color and styles where appropriate. | | | | X | | |
| 057. Stock merchandise in appropriate place and appropriate manner. | | | X | | | |
| 058. Identify the necessary stockkeeping and housekeeping duties as they relate to proper stock care. | X | | | | | |
| 059. Keep customer want slips as told by manager. | | | | X | | |
| 060. Advise buyer of merchandise needs. | | | | X | | |
| 061. Identify the necessary steps in closing out the department at the end of a selling day. | X | | | | | |
| 062. Review for accuracy and complete, if necessary, receiving records such as freight ticket, packing slip and invoice. | X | | | X | | |
| . Check merchandise for completeness of order and condition of items. | X | | X | | | |
| 064. Follow through on non-delivered or lost merchandise. | | | | X | | |
| 065. Follow correct procedures in handling defective/damaged merchandise. | X | | X | X | | |
| 066. Place price tags on the merchandise when necessary. | | | | X | | |
| 067. Mark merchandise on selling floor where price tags have been removed or lost according to store policy. | X | X | | | | |
| 068. Operate cash register: itemize sales, ring total, add tax, change tapes, correct voids and take readings. | X | | | X | | |
| 069. Determine the correct change and count it back to a customer during a cash sale according to company procedure. | X | | | X | | |
| 070. Balance cash drawer against register reading and complete appropriate forms for register close-out. | X | | | X | | |
| 071. Authorize customer checks according to the store's policy. | X | X | | | | |
| 072. Examine credit cards and checks for bad credit or stolen cards. | X | | | | | |
| 073. Conduct periodic stock counts for reordering of stock (unit control) and for annual inventory (dollar control). | X | X | | | | |
| | | | | | | |
| | | | | | | |

*LEVEL I - Recall, II - Comprehension, III - Application

**COMPETENCY 055:** Locate stock on the selling floor and in understock or reserve stock.

TEST ITEM 055-00-11

See Test Item 073-00-13.

TEST ITEM 055-00-12

INSTRUCTIONS TO THE TEACHER: Reproduce the stockroom floor plan in SA-2.

INSTRUCTIONS TO STUDENTS: Today you are working in the children's shoe department, putting up new stock. During a "rush period", your manager asks you to assist on the sales floor. You wait on two customers who wish to be shown the following shoes:

| | | STOCK LOCATION |
|---|---|---|
| CUSTOMER 1: | navy striped tennis shoe, size 6-C | ____________ |
| | yellow wedge sandle, size 6-C | ____________ |
| CUSTOMER 2: | white Mary Jane shoe, size 2 1/2-B | ____________ |

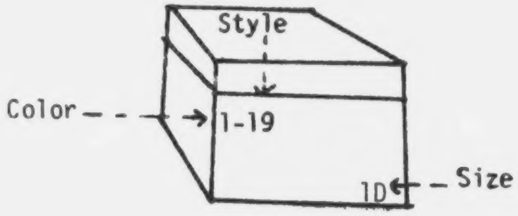
The shoes have the following style numbers:

Flat sandles - 19
Wedge sandles - 30
Thong sandles - 59
Plain tennis shoe - 25
Stripe tennis shoe - 27
Mary Jane dress shoe - 61
Open toe dress shoe - 65
Slip-on dress shoe - 70

The color code is:

Black - 1
Brown - 2
Navy - 3
Red - 4
Tan or beige - 5
Lt. blue - 6
Grey - 7
White - 8
Wine - 10
Green - 11
Orange - 12
Yellow - 13

Boxes are marked in the following manner:



TEST ITEM 055-00-12

Using the floor plan of the stockroom (provided by your instructor), indicate where you would find the requested shoes. Place this information in the blanks under Stock Location. The stockroom location will be shown by aisle letter, shelf number and shelf letter (i.e. A-1-e, would be a black flat sandle, size 2-B). If the requested shoe is not in stock, write OUT in the blank and the location of a shoe you would show as a substitute.

**COMPETENCY 057:** Stock merchandise in appropriate place and appropriate manner.

TEST ITEM 057-00-11

See Test Item 073-00-13 (Part 8).

COMPETENCY 058: Identify the necessary stockkeeping and housekeeping duties as they relate to proper stock care.

TEST ITEM 058-00-11

See Test Item 073-00-13 (Part 9).

TEST ITEM 058-00-12

INSTRUCTIONS TO STUDENTS: List five daily and five weekly house keeping duties regularly performed in most apparel stores.

| Weekly | Daily |
|---|---|
| 1. | 1. |
| 2. | 2. |
| 3. | 3. |
| 4. | 4. |
| 5. | 5. |

COMPETENCY 059: **Keep customer want slips as told by manager.**

TEST ITEM 059-00-11

See Test Item 073-00-13 (Part 10).

442

**COMPETENCY 060:** Advise buyer of merchandise needs.

TEST ITEM 060-00-11

See Test Item 073-00-13 (Part 11).

COMPETENCY 061: Identify the necessary steps in closing out the department at the end of a selling day.

TEST ITEM 061-00-11

See Test Item 073-00-13 (Part 18).

444

COMPETENCY 062: Review for accuracy and complete, if necessary, receiving records such as freight ticket, packing slip and invoice.

TEST ITEM 062-00-11

See Test Item 073-00-13 (Part 1).

TEST ITEM 062-00-12

INSTRUCTIONS TO TEACHER: Reproduce the invoice and the freight bill.

INSTRUCTIONS TO STUDENTS: Using the invoice given to you by your teacher and the information below, complete the freight bill.

**Information** needed: The rate is $93.58
Date the freight **bill** was issued: December 8
Carrier number: **472-1**
Driver: Tim Speedy
Shipment arrived: December 11 at **10 a.m.**

7892

## TOP of the LINE

**1984 Seventh Avenue**
**New York, New York 10014**

**Sold To:**
Logan's
2808 Carolina Avenue
Raleigh, NC 27511

**Order No.** 2901

**Dept. No.** 2

**Date** December 7, 1982

**No. pieces shipped:** 6

**Terms** 8/10 EOM

**Weight:** 182 lbs

**Via:** Faraway Transit
FOB Vendor

| Quantity | Style No. | Description | Unit cost | Extension |
|---|---|---|---|---|
| 10 | 4761 | Princess-line coats | 71.00 | 710.00 |
| 20 | 9857 | Pea Coats | 42.00 | 840.00 |
| 10 | 5231 | Trench coats | 55.00 | 550.00 |
| 5 | 3076 | Chesterfield coats | 61.00 | 305.00 |
| 20 | 1146 | Balmacaan raincoats | 38.00 | 760.00 |
|  |  |  | Total | 3,165.00 |
|  |  | **Returns and Claims:** None accepted after 10 days from receipt of goods | Less discount<br>discount at 8% | 253.20 |
|  |  |  | AMOUNT DUE | 2,911.80 |

# RAINWATER TRANSFER COMPANY

4589 Houston Street
New York, New York 10037

Date ______________ 19___

4613R

| Consignee | Shipper |
|---|---|
| Received by ________________ | Driver ______________ Pt. of origin ____________ |
| Date ____________ Hour ________ | Carrier No. ____________ |

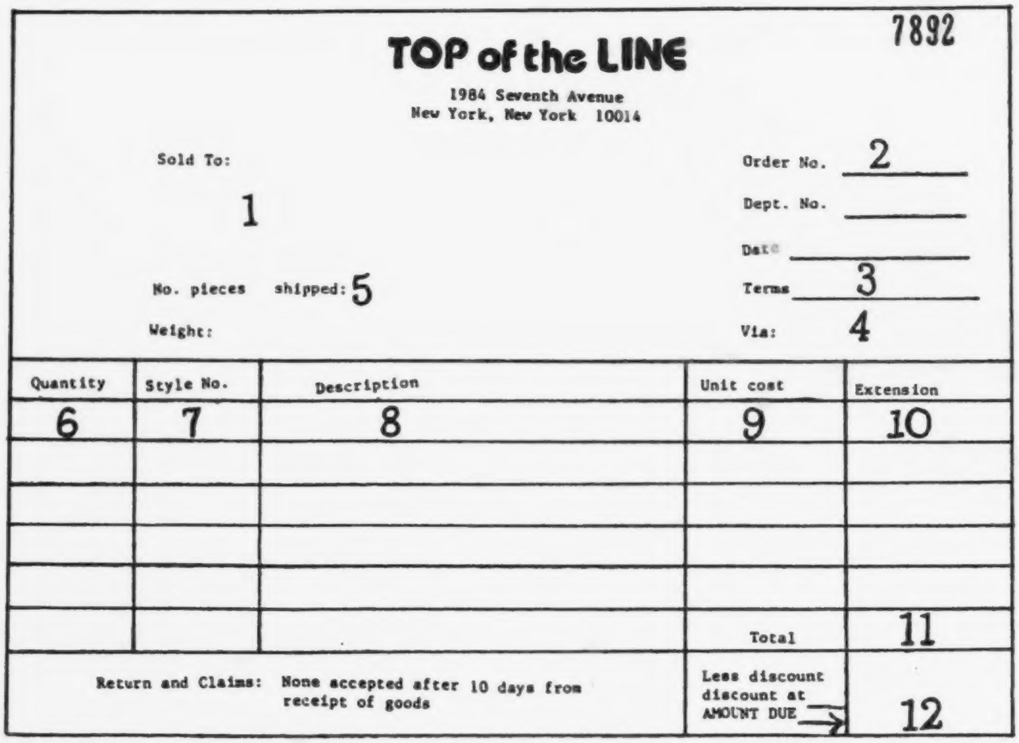
| Pieces | Description of contents | Weight | Rate | Charges |
|---|---|---|---|---|
| | | | | Prepaid ☐<br>Collect ☐ |
| Total | ICC regulations requires payment within 7 days. | Total | Pay this amount → | |

Operations 61

TEST ITEM 062-00-12

TEST ITEM 062-00-13

INSTRUCTIONS TO STUDENTS: Study the invoice below and write in the blanks provided the kind of information that goes in each of the numbered areas and where you find the information.



7892

**TOP of the LINE**

1984 Seventh Avenue
New York, New York 10014

Sold To:

1

Order No. 2
Dept. No.
Date
Terms 3
Via: 4

No. pieces shipped: 5

Weight:

| Quantity | Style No. | Description | Unit cost | Extension |
|---|---|---|---|---|
| 6 | 7 | 8 | 9 | 10 |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | Total | 11 |
| | | Return and Claims: None accepted after 10 days from receipt of goods | Less discount<br>discount at<br>AMOUNT DUE → | 12 |

| KINDS OF INFORMATION | SOURCE OF INFORMATION |
|---|---|
| 1. | |
| 2. | |
| 3. | |
| 4. | |
| 5. | |
| 6. | |

COMPETENCY 063: Check merchandise for completeness of order and condition of items.

TEST ITEM 063-00-11

INSTRUCTIONS TO STUDENTS: List the four checks that are usually made when checking merchandise into the store or department.

1.

2.

3.

4.

TEST ITEM 063-00-12

See Test Item 073-00-13 (Part 1).

**COMPETENCY 064:** Follow through on non-delivered or lost merchandise.

TEST ITEM 064-00-11

**INSTRUCTIONS TO TEACHER:** Reproduce the freight bill and the Receiving Exceptions Report

TEST ITEM 064-00-11

INSTRUCTIONS TO STUDENTS: Assume that you are receiving merchandise at Logan's (#3) in the girl's department (#14) on January 16. Your manager has already accepted the shipment and had the proper notation made on the freight bill. Now your manager asks you to complete a receiving exception report on this shipment. Using the invoice and report form provided by your teacher, complete the receiving exception report.

## Teal Truckers

51 Mint Street
Los Angeles, California 90082

Date October 25 19 83

925

| Consignee | Shipper |
|---|---|
| Logan's<br>2808 Carolina Avenue<br>Raleigh, NC 27511 | Sugar 'n Spice<br>147 Overhill Avenue<br>Los Angeles, al. 90146 |
| Received by *M. Fussman*<br>Date *Oct. 30* Hour *11:20 a.m.* | Driver J. Smith Pt. of Origin L.A., Cal.<br>Carrier No. 710 |

| Pieces | Description of contents | Weight | Rate | Charges |
|---|---|---|---|---|
| 4<br>*1 box missing J. Smith* | Dresses | 48 | $57.60 | Prepaid ☐<br>Collect ☒ |
| Total 4 | ICC regulations requires payment within 7 days. | Total 48 | Pay this amount → | $57.60 |

TEST ITEM 064-00-11

# LOGAN'S

## Receiving Exception Report

Store No.______ Dept. No.______ Date____________ Submitted by__________________

1. Check type of report: ______Shipment from vendor ______Shipment from warehouse
______Transfer shipment, sending store______
______Procedure error

2. Received from (shipper)______________________________ **Date rec'd.**__________

**Via**______________________________ **Freight** Bill No.__________________

3. Freight bill calls for________________(cases___or hanging pieces__________)

Actually received____________________(cases___or hanging pieces__________)

4. If cases, check condition: ______Hole ______Ripped seam ______Wet ______Stained

______Crushed ______Gouged

5. Check error detail: ___Merchandise improperly ticketed ___Price/Quantity not listed
___Wrong color, size, or style ___No control document
___Shipment short
___Shipment over

Describe circumstances, comments and/or remarks:______________________________

______________________________________________________________________

6. Description of merchandise of content of boxes is over or short:

| Vendor | Class | Style | Quantity | | Unit Retail | Total Retail | |
|---|---|---|---|---|---|---|---|
| | | | over | short | | over | short |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |

7. If damaged, did inspector pickup salvage?__________If so, attach bill of lading, if not, hold merchandise in store until told how to dispose of it.

Department Manager's Signature______________________

COMPETENCY 065: Follow correct procedures in handling defective/damaged merchandise.

TEST ITEM 065-00-11

INSTRUCTIONS TO STUDENTS: In Column I is damaged merchandise that is in your department at Logan's. From the alternatives for handling defective/damaged merchandise in Column II, select the one which is most appropriate for each item in Column I. Record the letter of your choice in the space provided to the left.

Column I

_____ 1. Pant with missewn leg.

_____ 2. Badly faded shirt from display window.

_____ 3. Jacket with lining that shrunk when dry cleaned the first time.

_____ 4. Suit with a button missing. Button lost in store.

_____ 5. Sweater with snag in the back while being tried on.

_____ 6. Shirt with collar pulled loose.

_____ 7. Handkerchiefs hemmed incorrectly.

_____ 8. Trousers with dirty hem from being used in a fashion show.

_____ 9. Raincoat with a rip in the back-has been in department for a month.

_____10. Leather belt that has become scarred.

Column II

A. Mark out of inventory and send back to the vendor.

B. Repair and sell at regular retail price.

C. Mark down and sell at a reduced price.

D. Mark out of stock and destroy or give to charity.

TEST ITEM 065-00-12

See Test Item 073-00-13 (Part 3).

TEST ITEM 065-00-13

**INSTRUCTIONS TO TEACHER:** Reproduce a copy of the following forms for each student: receiving exception report, request for return of merchandise, damage ticket, inventory adjustment report, and return to vendor form.

**INSTRUCTIONS TO STUDENTS:** For each of the forms you have been provided, list the appropriate time to use each in handling defective/damaged merchandise.

| FORM | WHEN TO USE |
|---|---|
| 1. Receiving Exception Report | 1. ____________________ |
| 2. Request for Return of Merchandise | 2. ____________________ |
| 3. Damage Ticket | 3. ____________________ |
| 4. Inventory Adjustment Report | 4. ____________________ |
| 5. Return to Vendor Form | 5. ____________________ |

TEST ITEM 065-00-13

# LOGAN'S

## Receiving Exception Report

Store No.______Dept. No.______Date____________Submitted by__________________

1. Check type of report:______Shipment from vendor _____Shipment from warehouse
______Transfer shipment, sending store______
______Procedure error

2. Received from (shipper)____________________________Date rec'd.___________
Via____________________________Freight Bill No.________________

3. Freight bill calls for________________(cases___or hanging pieces___________)
Actually received____________________(cases___or hanging pieces___________)

4. If cases, check condition: _____Hole _____Ripped seam _____Wet _____Stained
_____Crushed _____Gouged

5. Check error detail: ___Merchandise improperly ticketed ___Price/Quantity not listed
___Wrong color, size, or style ___No control document
___Shipment short
___Shipment over

Describe circumstances, comments and/or remarks:____________________________
______________________________________________________________

6. Description of merchandise of content of boxes is over or short:

| Vendor | Class | Style | Quantity | | Unit Retail | Total Retail | |
|---|---|---|---|---|---|---|---|
| | | | over | short | | over | short |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |

7. If damaged, did inspector pickup salvage?________If so, attach bill of lading, if not, hold merchandise in store until told how to dispose of it.

Department Manager's Signature____________________

TEST ITEM 065-00-13

______________________
Location

# REQUEST FOR RETURN OF MERCHANDISE

Date____________________

To______________________________

Street__________________________

City____________________________

Re: Invoice #__________ Invoice Date__________

Permission is requested to return certain merchandise covered by the above invoice.

Items to be returned______________________________________________

__________________________________________________________________

__________________________________________________________________

Reason for return_________________________________________________

__________________________________________________________________

Mode of transportation proposed: Collect ( ) Prepaid ( )
( ) Parcel Post insured
( ) REA Express insured
( ) Motor Freight

Permissison is granted to return merchandise ______________________
(Signature) (Date)

Merchandise will be shipped to above address unless indicated here.
______________________________
______________________________

If reply is not received within___days, the return will be made as indicated.

Please return authorization to the attention of______________________

TEST ITEM 065-00-13

# LOGAN'S

## DAMAGED OR DEFECTIVE MERCHANDISE TICKET

**Complete and attach to merchandise as soon as damage or defect is found.**

**Department** ______________________________

**Store** ____________ **Date Discovered** ____________________

**Item Description** ______________________________

**Price (or amount of credit given)** __________________

**Describe Damage or Defect** ______________________________

______________________________________

______________________________________

______________________________________

**Prepared By** ______________________________

**Disposition:**

- ☐ Mark Out of Stock and Destroy
- ☐ Return-To-Vendor
- ☐ Markdown and Sell
- ☐ Repair
- ☐ Other ______________________________

**Please pin where defective*

TEST ITEM 065-00-13

INVENTORY ADJUSTMENT REPORT

No. 251

DATE ____________ Store No. ______ Department No. ______

by ________________

REASON
(Check one)
___ Returned to Vendor
___ Store Use
___ Sale
___ Destroyed or given to charity
___ Other ____________

| NO. | ARTICLE | QUANTITY | SIZE | OLD PRICE | NEW PRICE | AMT. OF ADJUSTMENT |
|---|---|---|---|---|---|---|
| | | | | | | |
| | | | | | | |
| | | | | | | |
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| | | | | | | |
| | | | | | | |
| | | | | | Total | |

TEST ITEM 065-00-13

# RETURN TO VENDOR FORM

Date________

Dept.________

Store No.____

Logan's
2808 Carolina Avenue
Raleigh, North Carolina 27511

B 11200

Address Label

Ship to: ____________________

____________________

____________________

Charge to: ____________________

____________________

____________________

We have charged your account for: ____________________Merchandise Returned

____________________Merchandise Found Short

____________________Merchandise Damaged

Reason for Return or Adjustment:____________________

| FROM VENDOR'S INVOICE | | | | | |
|---|---|---|---|---|---|
| Date | Amount | | Invoice Number | | |
| Mfg. Style No. | Quantity | Classification | Description | Unit Price | Total |
| | | | | | |
| | | | | | Total |

Number of Pieces______ Date Shipped___________ Signature________________

COMPETENCY 067: Mark merchandise on selling floor where price tags have been removed or lost according to store policy.

TEST ITEM 067-00-11

INSTRUCTIONS TO STUDENTS: Read each of the questions or incomplete sentences below. Determine which of the possible answers or completion choices is the most appropriate for each statement. Write the letter of this response in the space provided to the left.

_____ 1. The season letter on a price ticket specifies:

A. **Date** merchandise goes on sale.
B. **Date** merchandise arrived in the store.
C. **Date** merchandise must be inventoried.
D. Whether the item is fall, winter, spring or summer merchandise.

_____ 2. The cost code on a price ticket is helpful when:

A. Markdowns are being taken on specific items.
B. A sale to a customer is being made.
C. The merchandise is being advertised.
D. The merchandise is being arranged on the sales floor.

_____ 3. When is the best time to replace a lost price ticket?

A. At the end of each selling day.
B. When a customer wants to purchase it.
C. Only when specifically told to do so by the manager.
D. As soon as it is discovered.

_____ 4. It is necessary to make new price tickets when:

A. Merchandise has been damaged.
B. A customer returns merchandise with only one portion of the tag still on the item.
C. Pre-ticketed merchandise arrives in the store.
D. There is a price increase.

_____ 5. When a price tag has been lost and the manager is unavailable, where would you go to find the price of the item? (List all choices in the order you would select them).

A. Call the buyer.
B. Search for another item just like it on the sales floor.
C. Call a branch store to see if they have the same item.
D. Ask the customer what they have seen similar items selling for.

First, I would _____
Second, I would _____
Third, I would _____

TEST ITEM 067-00-12

See Test Item 073-00-13 (Part 5).

**COMPETENCY 068:** Operate cash register: itemize sales, ring total, add tax, change tapes, correct voids and take readings.

TEST ITEM 068-00-11

INSTRUCTIONS TO STUDENTS: In Column I are the parts of a cash register keyboard. From the functions in Column II, select the one which is most appropriate for each item in Column I. Record the letter of your choice in the space provided to the left.

Column I

_____ 1. Salesperson key
_____ 2. Total key
_____ 3. Department key
_____ 4. Transaction key
_____ 5. Amount key
_____ 6. No sale key
_____ 7. Correction key
_____ 8. Subtotal key
_____ 9. Tax key

Column II

A. Classifies the type of activities on the register, such as cash, charge, paid-out.
B. Records the amount of the transaction.
C. Identified who rang the transaction.
D. Totals all items before tax is added.
E. Indicates the amount of sales tax on a sale.
F. Frees amount which has been depressed but not rung up.
G. Indicates total amount of the transaction.
H. Records the merchandise by departments.
I. Allows you to open the cash drawer without ringing a sale.

TEST ITEM 068-00-12

INSTRUCTIONS TO TEACHER: After having instructed your students in the proper procedure for changing the receipt and detail audit tapes, have each student change these tapes using the correct procedure.

TEST ITEM 068-00-13

See Test Item 069-00-13.

COMPETENCY 069: Determine the correct change and count it back to a customer during a cash sale according to company procedure.

TEST ITEM 069-00-11

See Test Item 073-00-13 (Part 12).

TEST ITEM 069-00-12

See Test Item 073-00-13 (Part 13).

TEST ITEM 069-00-13

INSTRUCTIONS TO TEACHER: After having instructed your students on the procedure for operating the cash register available to you, have each student ring up a cash transaction correctly, announce the sale, accept the amount tendered, count the change back manually and thank the customer. Ahead of time do the following:

1. Obtain several sets of play money and have each student "set-up" the cash drawer.
2. Reproduce and cut apart the six sales transactions provided or make up some of your own, if you have a fairly large class. The key to each transaction will be on the back of the transaction and you may want to have a copy to look at while the student is role playing their part.
3. Tape a tax schedule to the cash register.
4. Reproduce and pass out student rating sheets for students to look at and to fill in their name.

NOTE: If there is no cash register available, simulate a cash drawer and evaluate students on counting change only. Change the student instructions and rating sheet to match up with the needs of an automatic register.

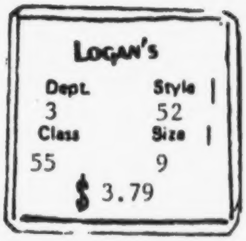
INSTRUCTIONS TO STUDENTS: You are to correctly ring up a cash sale on a cash register.

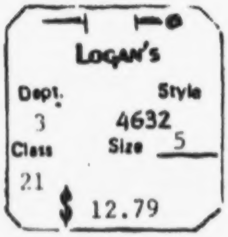
Follow the steps below:

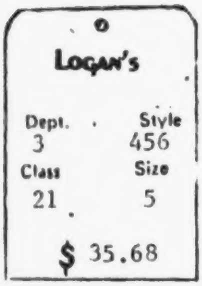
1. Take your place at the cash register and give the teacher your rating sheet.
2. Take the instruction sheet handed to you by the customer (your teacher) and ring up the amounts indicated on the sales tickets.
3. Subtotal, add tax and total sale, and announce the sale.
4. The customer will tender their money and you must compute the change and return it to the customer, following the steps for computing and returning change.
5. You will be rated on the rating sheet by your teacher.

TEST ITEM 069-00-13

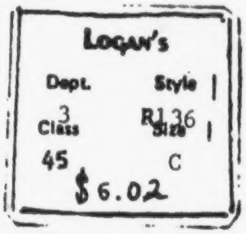
TRANSACTION 1

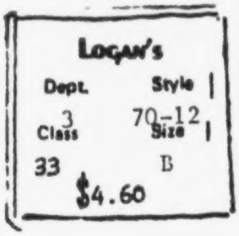

Logan's
Dept. 3
Style 52
Class 55
Size 9
$ 3.79

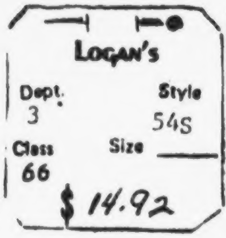

Logan's
Dept. 3
Style 4632
Class 21
Size 5
$ 12.79

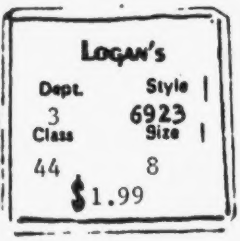

Logan's
Dept. 3
Style 456
Class 21
Size 5
$ 35.68

TRANSACTION 2

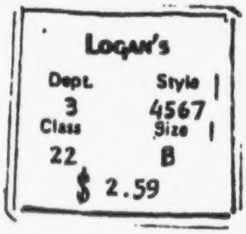

Logan's
Dept. 3
Style R136
Class 45
Size C
$ 6.02

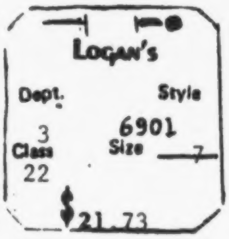

Logan's
Dept. 3
Style 70-12
Class 33
Size B
$4.60

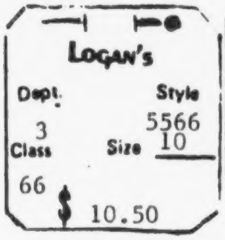

Logan's
Dept. 3
Style 54S
Class 66
Size
$ 14.92

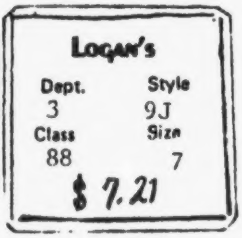

Logan's
Dept. 3
Style 6923
Class 44
Size 8
$1.99

TRANSACTION 3

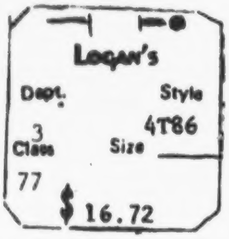

Logan's
Dept. 3
Style 4567
Class 22
Size B
$ 2.59

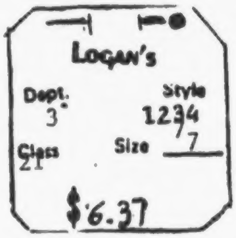

Logan's
Dept. 3
Style 6901
Class 22
Size 7
$21.73


Logan's
Dept. 3
Style 5566
Class 66
Size 10
$ 10.50

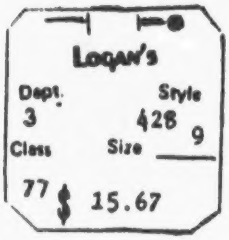

Logan's
Dept. 3
Style 9J
Class 88
Size 7
$ 7.21

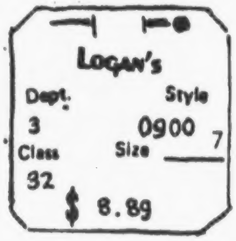
TRANSACTION 4

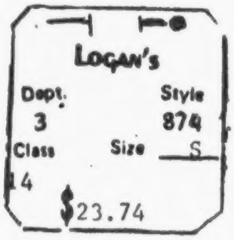

Logan's
Dept. 3
Style 4T86
Class 77
Size
$ 16.72


Logan's
Dept. 3
Style 1234
Class 21
Size 7
$ 6.37

TRANSACTION 5


Logan's
Dept. 3
Style 428
Class 77
Size 9
$ 15.67


Logan's
Dept. 3
Style 0900
Class 32
Size 7
$ 8.89


Logan's
Dept. 3
Style 874
Class 14
Size S
$23.74

TEST ITEM 069-00-13

## TRANSACTION 1

Student announces: That will be $52.26
Customer gives: $55.00
Student announces: That will be $52.26 out of $55

Your change should be:

| Gives | Says |
|---|---|
| 4 pennies | = 52.30 |
| 2 dimes | = 52.50 |
| 1 half | = 53.00 |
| 2 $1 | = 55.00 |

## TRANSACTION 2

Student announces: That will be $27.53
Customer gives: $30.00
Student announces: That will be $27.53 out of $30.00

Your change should be:

| Gives | Says |
|---|---|
| 2 pennies | = 27.55 |
| 2 dimes | = 27.75 |
| 1 quarter | = 28.00 |
| 2 $1 | = 30.00 |

## TRANSACTION 3

Student announces: That will be $42.03
Customer gives: $50.00
Student announces: That will be $42.03 out of $50

Your change should be:

| Gives | Says |
|---|---|
| 2 pennies | = 42.05 |
| 2 dimes | = 42.25 |
| 1 quarter | = 42.50 |
| 1 half | = 43.00 |
| 2 $1 | = 45.00 |
| 1 $5 | = 50.00 |

## TRANSACTION 4

Student announces: That will be $23.09
Customer gives: $30.00 (3 $10s)
Student announces: That will be $23.09 out of $30.00

Your change should be:

| Gives | Says |
|---|---|
| 1 penny | = 23.10 |
| 1 nickel | = 23.15 |
| 1 dime | = 23.25 |
| 1 quarter | = 23.50 |
| 1 half | = 24.00 |
| 1 $1 | = 25.00 |
| 1 $5 | = 30.00 |

## TRANSACTION 5

Student announces: That will be $48.35
Customer gives: $60.00 (3 $20s)
Student announces: That will be $48.35 out of $60

Your change should be:

| Gives | Says |
|---|---|
| 1 nickel | = 48.40 |
| 1 dime | = 48.50 |
| 1 half | = 49.00 |
| 1 $1 | = 50.00 |
| 1 $10 | = 60.00 |

TEST ITEM 069-00-13

## RATING SHEET

## CASH REGISTER OPERATIONS: MAKING CHANGE

INSTRUCTIONS: Circle the appropriate score for each item and total.

| | The student | Unacceptable | Poor | Average | Excellent |
|---|---|---|---|---|---|
| 1. | Greeted the customer | 0 | 1 | 2 | 3 |
| 2. | Rang up each amount correctly | 0 | 10 | 20 | 30 |
| 3. | Asked if there would be "anything else" before subtotaling | 0 | | | 3 |
| 4. | Charged correct amount of tax | 0 | | | 6 |
| 5. | Announced total amount of sale | 0 | | | 4 |
| 6. | Placed amount tendered on the change plate | 0 | | | 6 |
| 7. | Announced total sale and amount tendered | 0 | | | 3 |
| 8. | Used correct procedure to count change from cash drawer | 0 | 3 | 6 | 9 |
| 9. | Computed correct amounts of change | 0 | 3 | 6 | 9 |
| 10. | Used as few coins and bills as possible | 0 | 3 | 6 | 9 |
| 11. | Counted change into customer's hand, mentioning each coin and dollar denomination | 0 | 2 | 4 | 6 |
| 12. | Placed amount tendered in register drawer and closed the drawer immediately | 0 | | | 6 |
| 13. | Gave customer the receipt | 0 | | | 3 |
| 14. | Thanked the customer | 0 | 1 | 2 | 3 |

TOTAL SCORE ________

Total possible score is 100.

COMPETENCY 070: Balance cash drawer against register reading and complete appropriate forms for register close out.

TEST ITEM 070-00-11

INSTRUCTIONS TO STUDENTS: Complete the following sentences by writing the word/phrase that best completes the sentence in the blank.

1. The tape that gives daily sales totals and is used when closing out a register is called a ________________ tape.
2. Cash registers are usually closed ________________________________.
3. When the salesperson's total sales agree with the amount shown on the tape in the register, the register is said to be ________________.
4. When closing out a register, checks are considered to be the same as ________________.
5. When closing the register, the salesperson must remove the ________________, before counting the currency and coins.

TEST ITEM 070-00-12

See Test Item 073-00-13 (Part 19).

**TEST ITEM 070-00-13**

INSTRUCTIONS TO TEACHER: Reproduce the cash register close out form with the numbers.

INSTRUCTIONS TO STUDENTS: Carefully study the cash register close out report given to you. Identify, by writing in the blanks below, the kind of information that goes in each designated numbered area and where you would find that information.

| | Kind of Information | Source |
|---|---|---|
| 1. | | |
| 2. | | |
| 3. | | |
| 4. | | |
| 5. | | |
| 6. | | |
| 7. | | |
| 8. | | |
| 9. | | |
| 10. | | |
| 11. | | |
| 12. | | |

TEST ITEM 070-00-13

# LOGAN'S

## CASH REGISTER CLOSE OUT FORM

| Date | Opening Fund Amount | Store No. | Dept. No. | Register No. | Employee Closing: |
|---|---|---|---|---|---|
| | | | | | |

CASH: List amount at closing less opening fund.

| | |
|---|---|
| Pennies | |
| Nickels | |
| Dimes | |
| Quarters | |
| Half Dollars | |
| Currency | |
| 1. Total Currency and Coins (after removing opening fund) | |
| 2. Total Checks (+) | |
| 3. Total Gift Certificates (+) | |
| 4. Total Paid Outs (+) (attach vouchers) | |
| Postage | |
| Freight | |
| Supplies | |
| Other | |
| Other | |
| 5. Refunds (+) (attach tickets) | |
| 6. Cash Voids (+) | |
| 7. Total CASH Sales | |

Cash: ______ Proven

______ Over $ ________

______ Short $ ________

| | |
|---|---|
| 8. Charge Voids (+) | |
| 9. Store Charges | |
| 10. Bank Card Charges | |
| 11. Total Daily Sales (Add lines 6,7,8, & 9) | |
| 12. Detail Audit Tape Reading of Total Sales | |

13: Register:

______ Proven

______ Over

______ Short

### DAILY SUMMARY

Total Cash Sales ________

Total Charge Sales ________

Total Sales ________

Number of Paid Outs ________

Number of Voids ________

Number of No Sales ________

Number of Refunds ________

Reading of Customer Counter ________

Amount of Average Sales ________

Comments:

Individual Employee Totals:

Key A ________ Key C ________

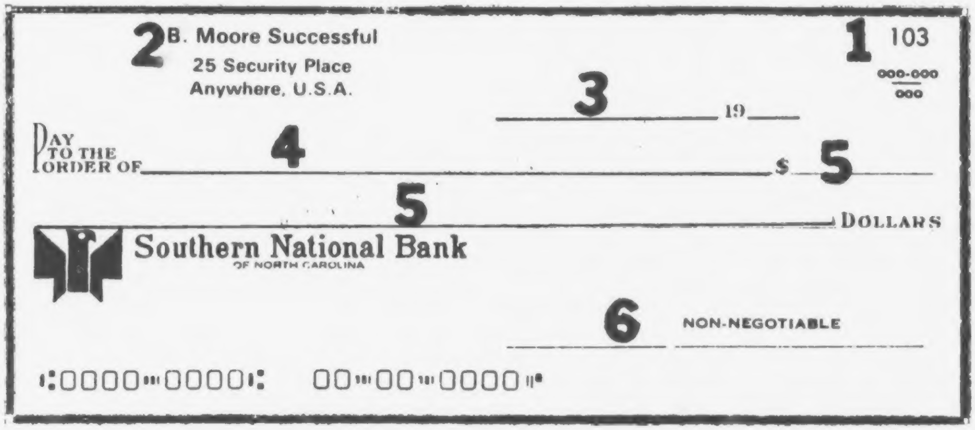
Key B ________ Key D ________

Operations
83

**COMPETENCY 071:** Authorize customer checks according to the store's policy.

TEST ITEM 071-00-11

**INSTRUCTIONS TO STUDENTS:** In the blanks that correspond to the numbers on the check below, write beside each part the requirements for acceptance in most apparel stores.



2 B. Moore Successful
25 Security Place
Anywhere, U.S.A.

1 103
000-000
000

3 ________ 19____

PAY TO THE ORDER OF ____ 4 ____ $ 5 ____

____ 5 ____ DOLLARS

Southern National Bank
OF NORTH CAROLINA

____ 6 ____ NON-NEGOTIABLE ________

⑆0000⑈0000⑆ 00⑈00⑈0000⑈

| Identify | Requirements for Acceptance |
|---|---|
| 1. ________ | 1. ________ |
| 2. ________ | 2. ________ |
| 3. ________ | 3. ________ |
| 4. ________ | 4. ________ |
| 5. ________ | 5. ________ |
| 6. ________ | 6. ________ |

TEST ITEM 071-00-12

See Test Item 073-00-13 (Parts 15 and 16).

TEST ITEM 071-00-13

See Test Item 073-00-13 (Part 14).

COMPETENCY 072: Examine credit cards and checks for bad credit or stolen cards.

TEST ITEM 072-00-11

INSTRUCTIONS TO STUDENTS: Read the case study below and list all possible steps that you could take.

It is just before closing time at Logan's, when a customer comes into the shoe department. He seems to be in a great hurry, and quickly picks out a pair of shoes and purchases them with his Master Charge. The purchase amounts to $72.00, not quite enough to require you to call the bank card company for approval. You write up the charge ticket and ask for his signature. This customer seems suspicious to you. What steps can you take to insure that this bank card does belong to this customer?

TEST ITEM 072-00-12

INSTRUCTIONS TO STUDENTS: Answer the questions below in the space provided.

1. List the steps you can take to insure that a store credit card is being used by the proper person.
2. What must you remember NOT to do if you are sure that a credit card is stolen?
3. Give two reasons why it is important that a customer sign a charge ticket.
   (1)
   (2)
4. What do you tell a customer if the credit office does not give you permission to authorize a sale?
5. What is a "floor limit"?

**COMPETENCY 073:** Conduct periodic stock counts for reordering of stock (unit control) and for annual inventory (dollar control).

TEST ITEM 073-00-11

**INSTRUCTIONS TO STUDENTS:** Read each of the incomplete sentences. Determine which of the possible completion choices is the most appropriate for each statement. Write the letter of this response in the space provided to the left.

_____ 1. An actual count of the merchandise on hand on a given date is called:

A. Perpetual inventory
B. Opening inventory
C. Physical inventory
D. Book inventory

_____ 2. Most alert retailers take a physical inventory at least:

A. Weekly
B. Monthly
C. Semi-annually
D. Annually

_____ 3. When a retailer is getting ready to take inventory:

A. He will increase the amount of stock on hand
B. He will reduce the amount of stock on hand
C. He will be unconcerned about the amount of stock on hand
D. He will have all of the stock moved to the stock room

_____ 4. Inventory is usually taken at:

A. Retail value
B. Cost value
C. Mark up value
D. Mark down value

_____ 5. A form on which basic inventory information is recorded is called:

A. A balance sheet
B. A profit and loss sheet
C. A work sheet
D. An inventory sheet

_____ 6. When an employer of a department store moves down the aisle to take inventory, he should not record:

A. The number of units
B. The retail price
C. A detailed description of each item
D. The cost price

TEST ITEM 073-00-12

INSTRUCTIONS TO STUDENTS: Read each of the following statements about inventory. Determine if each statement is true or false. Write the correct response 'true or false) in the blank to the left of each statement.

_____ 1. Both forms of inventory (physical and perpetual) are usually used by most apparel stores.

_____ 2. Unit control figures will give specific information on how many items of a style are in stock.

_____ 3. Mistakes on inventory sheets should be carefully erased and the correction made as soon as the error is discovered.

_____ 4. A physical inventory is necessary if a store is to have an accurate accounting of its profit.

_____ 5. Under no circumstances should any inventory sheet be destroyed because employees are accountable for each sheet.

TEST ITEM 073-00-13

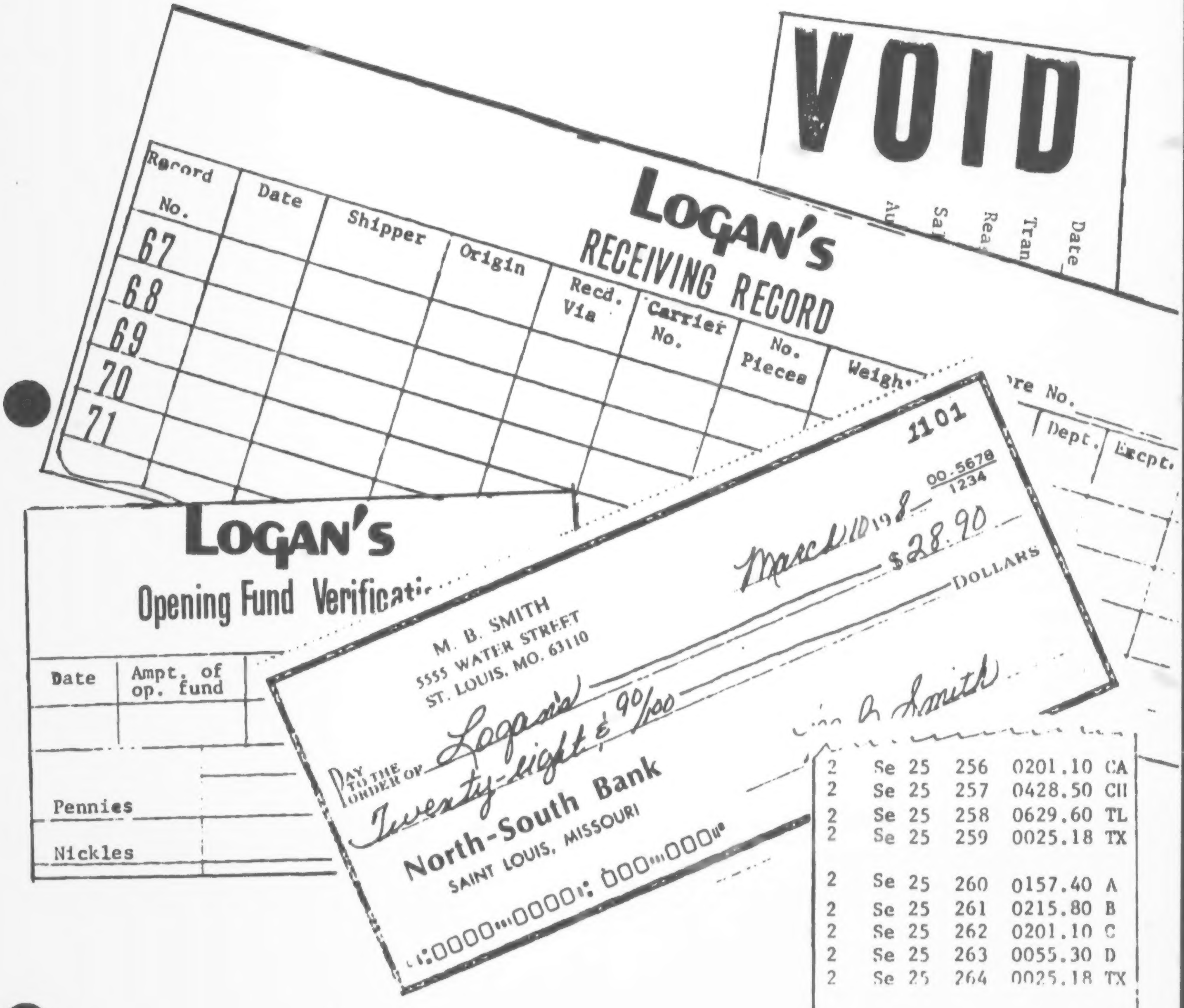
INSTRUCTIONS TO TEACHER: In order to make this unit more meaningful and show the interrelationship of forms and activities, the following Test Item has been organized to simulate an actual situation in an apparel store. This Test Item can be used as a project or an exam at the completion of the unit or the different parts can be used separately as you choose. Time for completing the entire Test Item is approximately two hours, if the students work consistantly. You will need to reproduce one Test Item Booklet for each student, one set of answer sheets and one set of forms. The forms that you will need to reproduce are:

Buyers Purchase Order
Invoice
Freight bill
Inventory Adjustment Report
Return to Vendor Form
Memo Form
Rating Sheet for Memo (This is for your use and is not given to the students.)
Floor plan for the department
Rating sheet for floor plan (For your use only)
Basic Stock List
Stock Requisition
Merchandise Description Sheet
Inventory Counting Sheet
Register Close Out Report

Prepare a file folder for each student which contains the Test Item Booklet, the answer sheets, and the forms listed above.

INSTRUCTIONS TO STUDENTS: Your teacher will give you a booklet which you should read carefully. It is divided into parts and each part requires an answer from you or asks you to perform some duty. You will also receive a file folder which contains answer sheets and forms which you will be asked to complete.

# A LONG DAY AT LOGAN'S



VOID

Au

Sa

Rea

Tran

Date

LOGAN's

RECEIVING RECORD

| Record No. | Date | Shipper | Origin | Recd. Via | Carrier No. | No. Pieces | Weigh | re No. | Dept. | Recpt. |
|---|---|---|---|---|---|---|---|---|---|---|
| 67 | | | | | | | | | | |
| 68 | | | | | | | | | | |
| 69 | | | | | | | | | | |
| 70 | | | | | | | | | | |
| 71 | | | | | | | | | | |

LOGAN's

Opening Fund Verificati

| Date | Ampt. of op. fund |
|---|---|
| | |
| Pennies | |
| Nickles | |

1101

00-5678
1234

M. B. SMITH
5555 WATER STREET
ST. LOUIS, MO. 63110

March 10 198_

$28.90

PAY TO THE ORDER OF Logan's

Twenty-eight & 90/100 DOLLARS

North-South Bank
SAINT LOUIS, MISSOURI

a Smith

⑆0000⑈0000⑆ 000⑈000⑈

| | | | | | |
|---|---|---|---|---|---|
| 2 | Se | 25 | 256 | 0201.10 | CA |
| 2 | Se | 25 | 257 | 0428.50 | CH |
| 2 | Se | 25 | 258 | 0629.60 | TL |
| 2 | Se | 25 | 259 | 0025.18 | TX |
| 2 | Se | 25 | 260 | 0157.40 | A |
| 2 | Se | 25 | 261 | 0215.80 | B |
| 2 | Se | 25 | 262 | 0201.10 | C |
| 2 | Se | 25 | 263 | 0055.30 | D |
| 2 | Se | 25 | 264 | 0025.18 | TX |

TEST ITEM 073-00-13

# A LONG DAY AT LOGAN'S

On September 2, you are working, parttime, for Logan's (#3), in the Junior Sportswear Department (#3). Your department has four fulltime employees:

| | Employee Number | Assigned to Register |
|---|---|---|
| Sally Smith, Manager | 01 | #1 Key A |
| Linda Brown | 02 | #2 Key A |
| Charles Grey | 03 | #1 Key B |
| Becky Little | 04 | #1 Key C |

and three parttime employees:

| | | |
|---|---|---|
| Don New | 05 | #2 Key B |
| Susie Careless | 06 | #1 Key D |
| "You" | 07 | #2 Key C |

Today you are scheduled to work from 2:00 p.m. until closing. After 5:00 p.m., you and Don will be the only employees in the department. You will be in charge, since Don has only worked for one week, and still needs a lot of help.

When you arrive at work, Sally asks you to check-in some newly arrived merchandise. She has accepted the order and needs you to log it on the receiving record and check the items against the invoice and the buyer's purchase order.

1a. In your folder, you have the buyer's order form, the invoice and the freight bill for this shipment. Record the shipment on the receiving record which you will find on the answer sheet.

1b. You make the following count of items in the shipment:

18 blouses, style 482
24 blouses, style 333
15 vests, style 271
26 skirts, style 271
14 pants, style 252

You notice that these items coordinate with each other and are in the newest fall colors.

Using the buyer's order form and the invoice, make the necessary checks to indicate receipt of goods on the invoice.

1c. There is one check which cannot be made on the invoice, but is an important step in checking in merchandise. What is it? Record your answer in the space provided on the answer sheet.

2. The buyer's order form tells who must pay the transportation cost for this shipment. Indicate on the answer sheet who is to pay.

3. While checking the merchandise, you find that two items must be returned to the vendor because they arrived defective, one skirt, size 9, has a flaw in the material, one pair of pants, size 7, has one leg shorter than the other. When you show these two items to Sally, she asks you to return them to Arpeja today, since Logan's has an "open return policy" with this vendor. You will need to complete an inventory adjustment report, a return to vendor form and write a memorandum indicating the reasons for the return. Do this now on the three forms provided in your folder.

TEST ITEM 073-00-13

4. On the answer sheet explain the meaning of an "open return policy."

5a. After you finish the forms for returning the defective merchandise, Sally asks you to mark the price tags for everything that you received. Since Don has not done this before, she asks you to show him the procedure for marking new price tags. You explain to Don that Logan's uses the cost code of "PARISCLOTH" and the seasonal code is "HAVEFUNTODAY." You also explain the Logan's uses a keystone markup to determine the retail price. You mark one tag for each style of merchandise to show Don how it is done. On your answer sheet you will find the tags. Mark them now using size 9.

5b. While you are marking the price tags, Sally asks you to mark down a jumper 30% that was damaged on display. You will find the tag to be changed and the price change form on the answer sheet.

6. Don asks you what "class" on the price ticket means. Write on the answer sheet what you would tell him.

7. As she is getting ready to leave for the day, Sally tells you and Don to put the merchandise that you received on the sales floor, if there is time. Otherwise put it in an appropriate place and it will be put out tomorrow. After she leaves, Don asks you where else the merchandise could be placed. You tell him the names of the three major stock locations, and tell him where each is located. On the answer sheet write what you would tell Don.

8. Since the dinner hour is usually slow, you decide that this is a good time for you and Don to arrange the newly arrived merchandise on the sales floor. Using the floor plan in your folder and the list of merchandise below, indicate by placing the merchandise number on the fixture how you will arrange the department.

Unless indicated as new or sales items, assume other merchandise has been in your department for a week or so.

1. New blouses and coordinated pants and vest
2. New blouses and coordinated skirts
3. Trendy jumpsuits in 2 colors
4. Coordinated velvet skirts and pants and tweed blazers, lacy blouses--new
5. Clearance of summer skirts
6. Trendy pants--4 colors
7. Jeans
8. Basic pants
9. Basic blouses
10. Silk blouses
11. Basic pant style in fashion colors
12. Plaid shirts
13. Basic bulky sweaters
14. Sale--summer blouses
15. Hand knit sweaters--4 styles
16. Velvet skirts and ruffle blouses--new
17. Basic jackets
18. Sale--fall sweaters
19. Trendy pants and tops
20. Basic cowl sweaters--8 colors
21. Tweed skirt coordinated with sweaters
22. Basic blazers
23. Basic dresses
24. Dresses--four styles in shades of rust
25. Coordinated skirts and blouses
26. Trendy dresses

9. Don comments that he is glad that the two of you had to rearrange the department, because there is really not much to do tonight. You decide that now is a good time to tell him about all the regular stockkeeping duties that must be performed. You emphasize that in an apparel department there is always something to do. List at least ten of the stockkeeping duties that you would describe to Don.

10. Finally customers begin to come in again and you make several sales. However, you miss two sales because you do not have any plaid blazers, in size 5 or 13. You feel that it is important that Sally be made aware of the requests that you have had. You leave her a want slip for the blazers. Fill out the want slip that you will find in your folder, as you would leave it for Sally.

11. Noticing that some of your Top Seat jeans are getting low, you decide that this is a good time to show Don how to requisition items from a basic stock list. You show Don the basic stock list and the stock requisition form and tell him that as long as you have two items over the minimum required it is not necessary to request additional items. You explain, however, that when an item is requisitioned it is necessary to bring your stock up to maximum. You and Don make the following count of Top Seat jeans:

| | Size | Color | Quantity |
|---|---|---|---|
| Style 496 | 6,8,10,12 | blue d. | 10 in each size |
| | 6,12 | beige | 6 in each size |
| | 8,10 | beige | 4 in each size |
| | 6,8 | grey | 6 in each size |
| | 10,12 | grey | 4 in each size |
| Style 497 | 6 | blue d. | 2 |
| | 8,12 | blue d. | 4 in each size |
| | 10 | blue d. | 7 |
| | 6,12 | beige | 6 in each size |
| | 8,10 | beige | 8 in each size |
| | 6 | grey | 2 |
| | 8 | grey | 5 |
| | 10,12 | grey | 4 in each size |

These jeans are classified under 55. Using the basic stock list, complete the stock requisition form. Both of these are in your folder.

12. You watch Don while he is making a cash sale and notice that he is having trouble making change. After the customer leaves, you go over the eight steps in announcing a sale and returning the change to the customer. List these steps on the answer sheet as you would explain them to Don, being careful to list them in the proper order.

13. You have had only five cash sales today. On the answer sheet you will find the amount of these sales and the amount tendered. Indicate the amount of change that you returned to each of your customers, using the least number of coins and bills.

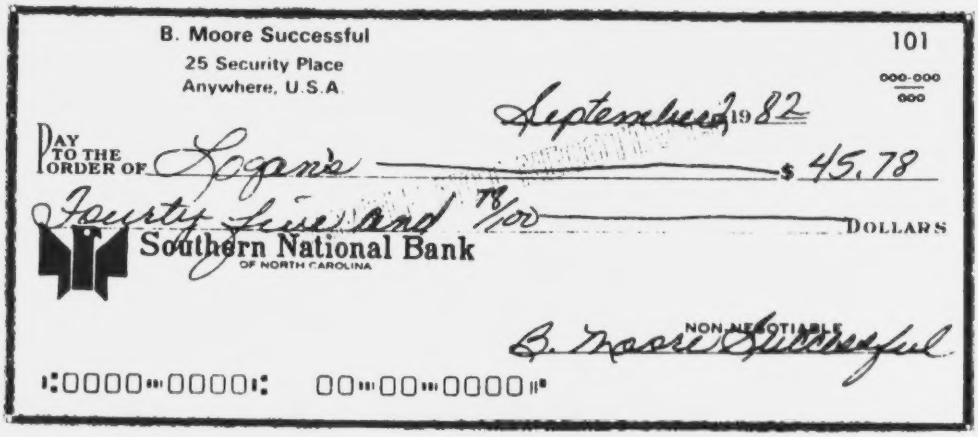
14. Don brings two checks to you for authorization.

**TEST ITEM** 073-00-13

**You will find these checks on the answer sheet. Indicate if they are acceptable or unacceptable. If the checks are unacceptable, circle the parts that make them unacceptable.**

15. **You explain to Don that** certain types of checks are not usually **accepted** at Logan's. On the answer sheet list the types of checks that you would tell Don **are unacceptable**.

16. You remind Don that Logan's store policy requires that the name be **printed** on the check, that it is written for the amount of purchase or **less, that** you have a driver's license and **a major** credit card, and that you get the phone number and **place** of employment. **Further,** if the check is over $50, you are supposed to call Check Fax. The next customer of Don's purchases a dress for $45.78. She presents the following check and identification.



B. Moore Successful
25 Security Place
Anywhere, U.S.A.

101

000-000
000

September 2 1982

PAY TO THE ORDER OF Logan's $ 45.78

Fourty Five and 78/100 DOLLARS

Southern National Bank
OF NORTH CAROLINA

NON-NEGOTIABLE

B. Moore Successful

⑆0000⑉0000⑆ 00⑉00⑉0000⑈

ID Presented: Driver's license and Social Security Number.

Don carefully studies the **face** of the check, writes the identification on the back, and **gives** the **lady her dress**. What would you **suggest to Don that he do differently to insure** that the customer's **credit** is good? **Write** your **suggestions on the** answer sheet, explaining anything that you **feel Don** won't understand.

17. **Just before closing time,** the blouse buyer **for** your **department calls and asks for an** inventory **on all** Ladyette blouses that you have in stock. He is going to re-order from this vendor tomorrow and needs this information before he **places the order. He apologizes** for calling **so late, but he has just gotten clearance on the funds and** needs to act immediately. **Since this will be a short inventory, you tell the** buyer that the inventory will **be on Sally's** desk in the morning.

Using the merchandise description sheet in your folder, have Don call the items while you list them on the inventory counting sheet (which is also in your folder).

TEST ITEM 073-00-13

18. Before you know it, it is 9:00 p.m. and time to begin closing your department. List the duties that you and Don will have to perform.

19. As soon as the department is officially closed, you begin to close and balance the register. You open the cash drawer and find the following information:

    -Cash in the cash drawer is: $3.43 in pennies, $11.00 in nickels, $16.00 in dimes, $18.00 in quarters, and $9.00 in half dollars

    -You count $351.00 in bills

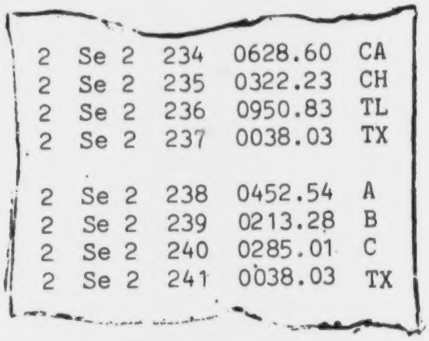
    -Your opening fund verification indicates that you had $50.00, which included: $3.00 in pennies, $4.00 in nickels, $6.00 in dimes, $10.00 in quarters, $5.00 in half dollars, and $22.00 in bills

    -Other items in the drawer include: $182.70 in checks, a $10.00 gift certificate, $20.00 in Paid outs for freight charges, $57.42 in cash voids, $81.27 in charge voids, $61.80 in bank card charges and $179.16 in store charges

    Taking readings from your activity counter indicates that you had:

    -68 customers during the day, 7 No sales, 0 returns, 7 voids, and 1 paid-out

    The detail audit tape indicates the following:



```
2  Se 2  234  0628.60  CA
2  Se 2  235  0322.23  CH
2  Se 2  236  0950.83  TL
2  Se 2  237  0038.03  TX

2  Se 2  238  0452.54  A
2  Se 2  239  0213.28  B
2  Se 2  240  0285.01  C
2  Se 2  241  0038.03  TX
```

    Complete the cash register close out report.

TEST ITEM 073-00-13

STUDENT ANSWER SHEET

1a.

# LOGAN'S

## RECEIVING RECORD

Store No.________

| Record No. | Date | Shipper | Origin | Recd. Via | Carrier No. | No. Pieces | Weight | Charges | Dept. | Excpt. | Re By |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 67 | | | | | | | | | | | |

1b. Mark the invoice in your folder.

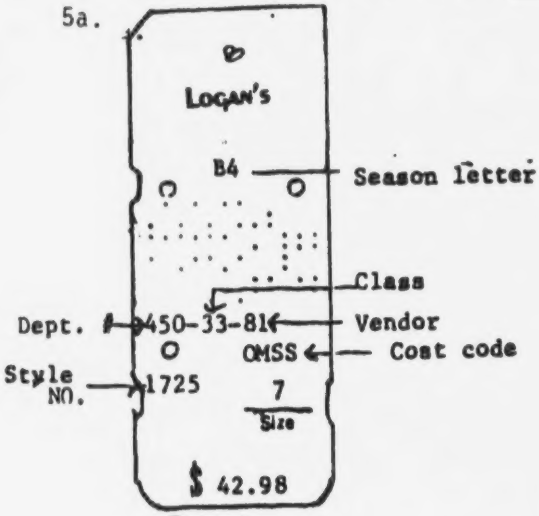
1c. Check for ____________________.

2. The ______________________ pays.

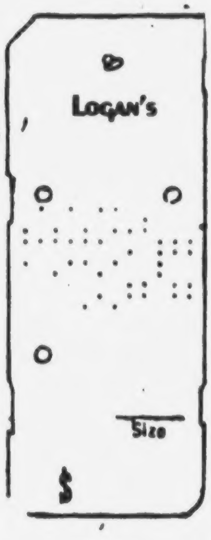
3. Complete the inventory adjustment report, return to vendor form and the memorandum in your folder.

4. "Open return policy" means ________________________________________________.

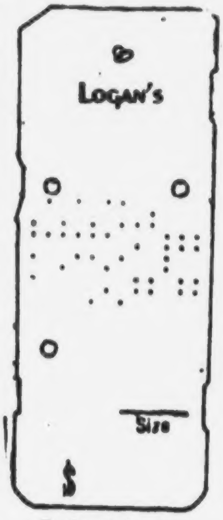
5a.


LOGAN'S
B4
Season letter
Class
Dept. #
450-33-81
Vendor
OMSS
Cost code
Style NO.
1725
7
Size
$ 42.98

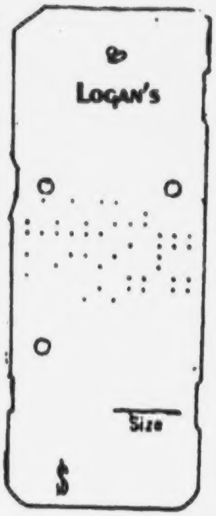
Example


LOGAN'S
Size
$

Vest

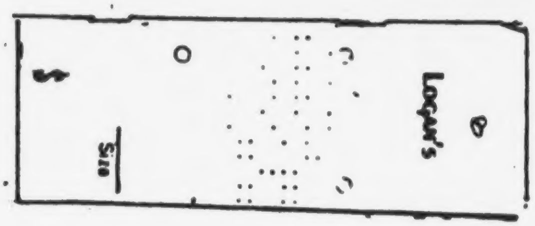

LOGAN'S
Size
$

Poly blouse

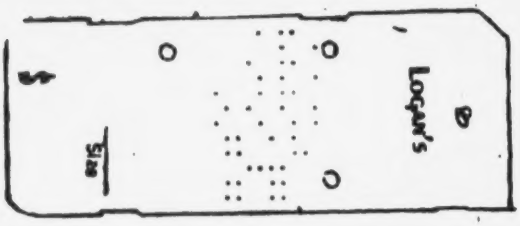

LOGAN'S
Size
$

Skirt

Pant


$
Size
LOGAN'S

cotton blouse


$
Size
LOGAN'S

TEST ITEM 073-00-13: Key

Name

STUDENT ANSWER SHEET

1a.

# LOGAN'S

## RECEIVING RECORD

Store No. 3

| Record No. | Date | Shipper | Origin | Recd. Via | Carrier No. | No. Pieces | Weight | Charges | Dept. | Excpt. | Rec. By |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 67 | 9-2-8- | Arpaja | N.Y.C. | Rain-water | W78S | 2 | 45 | #20.00 | 3 | – | S.J. |

1b. Mark the invoice in your folder.

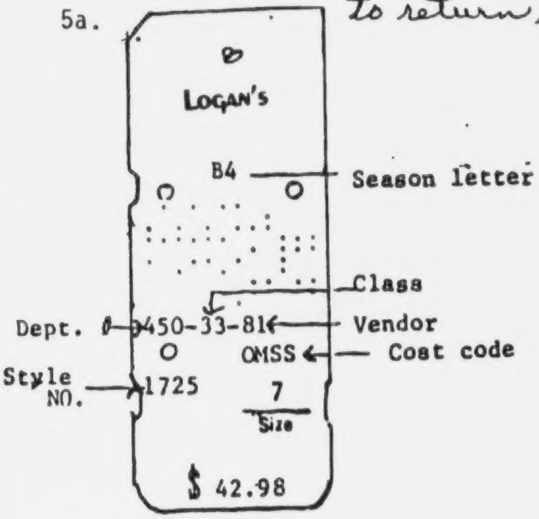
1c. Check for damaged or defective merchandise.

2. The store pays.

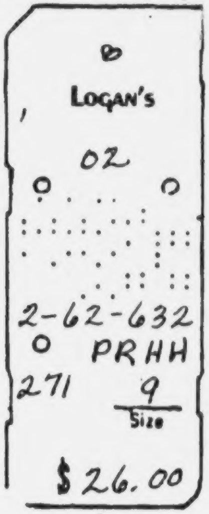
3. Complete the inventory adjustment report, return to vendor form and the memorandum in your folder.

4. "Open return policy" means not necessary to request permission to return merchandise.

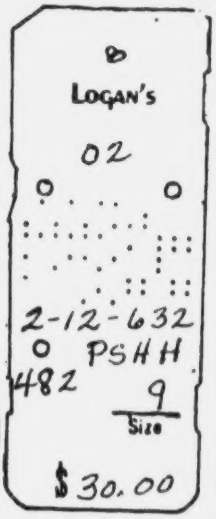
5a.


LOGAN's
B4
Season letter
Class
Dept.
450-33-81
Vendor
OMSS
Cost code
Style NO.
1725
7
Size
$ 42.98

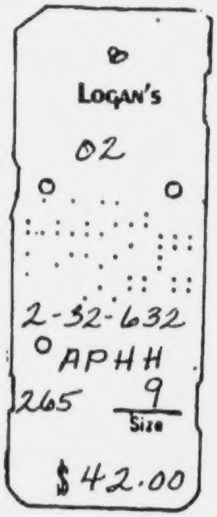
Example


LOGAN's
02
2-62-632
PRHH
271
9
Size
$26.00

Vest

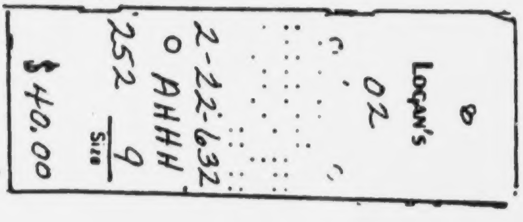

LOGAN's
02
2-12-632
PSHH
482
9
Size
$30.00

Poly blouse

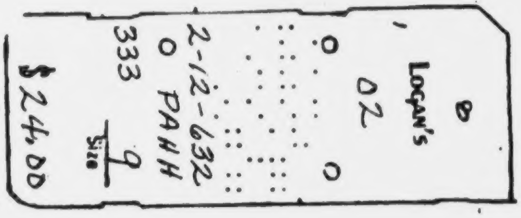

LOGAN's
02
2-32-632
APHH
265
9
Size
$42.00

Skirt

Pant


LOGAN's
02
2-22-632
AHHH
252
9
Size
$40.00

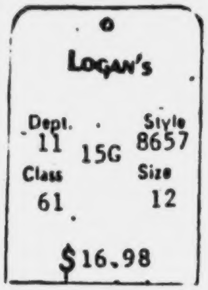
cotton blouse


LOGAN's
02
2-12-632
PAHH
333
9
Size
$24.00

TEST ITEM 073-00-13

STUDENT ANSWER SHEET (Continued)

5b. Price Ticket to be changed:



**LOGAN'S**

Dept. 11 15G Style 8657

Class 61 Size 12

$16.98

RETAIL PRICE CHANGE **LOGAN'S**

Store No.__________ Department No.__________ Date__________

Type of Change: _____Markdown _____Markup _____Markdown cancellation _____Markup Cancellation

By____________________ Authorized by____________________

| Style No. | Class | Article | Qty. | Old Price | New Price | Amount of Adjustment | Change Extension |
|---|---|---|---|---|---|---|---|
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | TOTAL | |

Why the change was necessary:

6. "Class" means ______________________________

7. Stock locations:

(1)

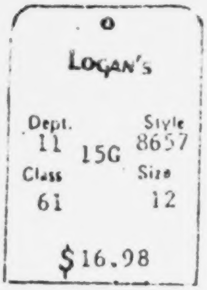
(2)

(3)

TEST ITEM 073-00-13: Key

## STUDENT ANSWER SHEET (Continued)

5b. Price Ticket to be changed:



LOGAN'S

Dept. 11

15G

Style 8657

Class 61

Size 12

$16.98

RETAIL PRICE CHANGE

**LOGAN'S**

Store No. 3 Department No. 3 Date 9-2-8-

Type of Change: ✓ Markdown ___ Markup ___ Markdown cancellation ___ Markup Cancellation

By Student name Authorized by Sally Smith

| Style No. | Class | Article | Qty. | Old Price | New Price | Amount of Adjustment | Change Extension |
|---|---|---|---|---|---|---|---|
| 8657 | 61 | jumper | 1 | 16.98 | 11.89 | 5.09 | 5.09 |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | TOTAL | 5.09 |

Why the change was necessary:
jumper faded will on display

6. "Class" means tells type of garment or subclassification

7. Stock locations:
   (1) Forward - on sales floor in view of customers
   (2) Under - on sales floor in drawers, etc.
   (3) Reserve - in the stockroom or warehouse.

STUDENT ANSWER SHEET (Continued)

8. Mark the floor plan in your folder.

9. List the 10 stockkeeping duties:

(1)________________________________________

(2)________________________________________

(3)________________________________________

(4)________________________________________

(5)________________________________________

(6)________________________________________

(7)________________________________________

(8)________________________________________

(9)________________________________________

(10)________________________________________

10.

**SEND TO OFFICE AT ONCE**

**WANT SLIP**

Salesperson__________ Date__________ Store No__________ Dept. No. ______

Code: SO - special order OS - out of stock

| Code | Description (item, color, size, price) | No. of requests | Customer name & address if special order |
|---|---|---|---|
| | | | |
| | | | |

| The following stock is low: Vendor, style, color, price | No. of pieces in stock |
|---|---|
| | |
| | |

SUGGEST A SUBSTITUTE

11. Complete the Stock Requisition in your folder.

TEST ITEM 073-00-13: Key

STUDENT ANSWER SHEET (Continued)

8. **Mark the floor plan in your folder.**

9. **List the 10 stockkeeping duties:**
   (1) *Receive, check, mark and sort new merchandise.*
   (2) *Arrange merchandise on floor.*
   (3) *Straighten racks.*
   (4) *Straighten tables and bins.*
   (5) *Check price tickets - remark if necessary.*
   (6) *Check for damaged merchandise*
   (7) *Steam merchandise when necessary*
   (8) *Rotate appropriate stock.*
   (9) *Make want slips. Advise buyer of merchandise needs.*
   (10) *Fill out stock requisition when necessary.*

10.

**SEND TO OFFICE AT ONCE**

## WANT SLIP

Salesperson student's name Date 9-2-8- Store No 3 Dept. No. 3

Code: SO - special order OS - out of stock

| Code | Description (item, color, size, price) | No. of requests | Customer name & address if special order |
|---|---|---|---|
| 05 | plaid blazers | 2 | —— |
| | | | |

| The following stock is low: Vendor, style, color, price | No. of pieces in stock |
|---|---|
| | |
| | |

SUGGEST A SUBSTITUTE

11. **Complete the Stock** Requisition in your folder.

## STUDENT ANSWER SHEET (Continued)

12. Steps, in order, for making change:

(1)________________________________________

(2)________________________________________

(3)________________________________________

(4)________________________________________

(5)________________________________________

(6)________________________________________

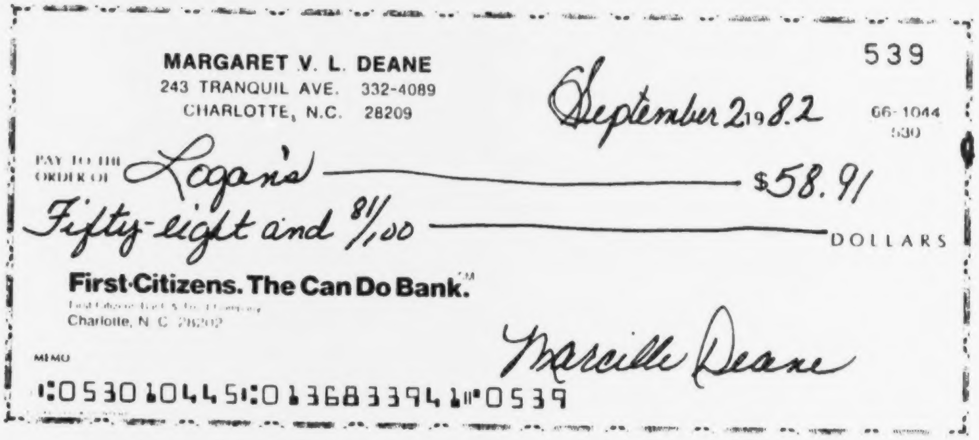
(7)________________________________________

(8)________________________________________

13.

| Amount of Sale | Amount Tendered | Denominations | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | | .01 | .05 | .10 | .25 | .50 | 1.00 | 5.00 | 10.00 |
| $ 6.95 | $10.00 | | | | | | | | |
| 9.81 | 20.00 | | | | | | | | |
| 11.22 | 15.00 | | | | | | | | |
| 5.16 | 10.00 | | | | | | | | |
| 2.35 | 2.50 | | | | | | | | |

14.



**MARGARET V. L. DEANE**
243 TRANQUIL AVE. 332-4089
CHARLOTTE, N.C. 28209

539

September 2 19 82

66-1044
530

PAY TO THE ORDER OF Logan's ——— $58.91

Fifty-eight and 81/100 ——— DOLLARS

**First·Citizens. The Can Do Bank.**℠
Charlotte, N. C. 28202

MEMO

Marcille Deane

⑆053010445⑆0136833941⑈0539

Acceptable ______ ______________________________

Unacceptable ______ ______________________________

______________________________

TEST ITEM 073-00-13: Key

STUDENT ANSWER SHEET (Continued)

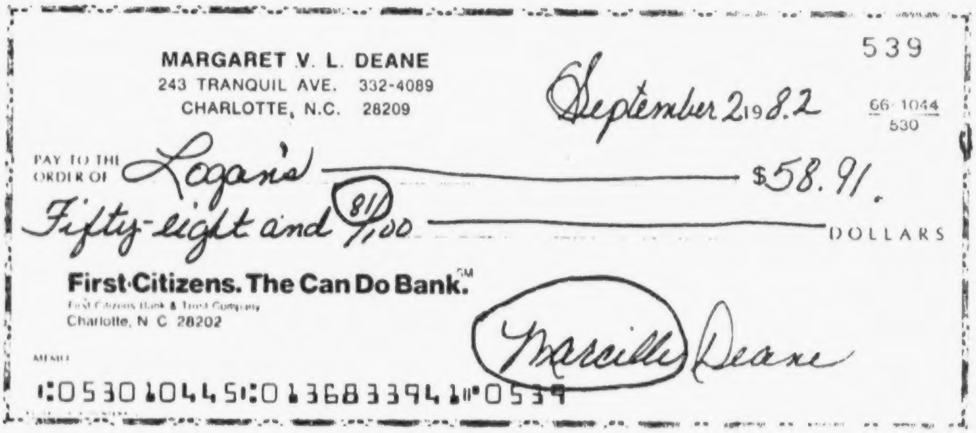
12. **Steps, in order, for making change:**

(1) Announce amount of sale.
(2) Place amount tendered on charge plate.
(3) Call back amount of sale and amount tendered.
(4) Count change from drawer.
(5) Count change into customer's hand
(6) Place amount tendered in cash drawer and close drawer.
(7) Give customer the receipt.
(8) Thank customer.

13.

| **Amount of Sale** | **Amount Tendered** | Denominations | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | | .01 | .05 | .10 | .25 | .50 | 1.00 | 5.00 | 10.00 |
| $ 6.95 | $10.00 | | 1 | | | | 3 | | |
| 9.81 | 20.00 | 4 | 1 | 1 | | | | | 1 |
| 11.22 | 15.00 | 3 | | | 1 | 1 | 3 | | |
| 5.16 | 10.00 | 4 | 1 | | 1 | 1 | 4 | | |
| 2.35 | 2.50 | | 1 | 1 | | | | | |

14.



539

MARGARET V. L. DEANE
243 TRANQUIL AVE. 332-4089
CHARLOTTE, N.C. 28209

September 2 1982

66-1044
530

PAY TO THE ORDER OF Logan's $58.91.

Fifty-eight and 81/100 DOLLARS

First·Citizens. The Can Do Bank.℠
First Citizens Bank & Trust Company
Charlotte, N C 28202

MEMO

Marcille Deane

⑆053010445⑆0136833941⑈0539

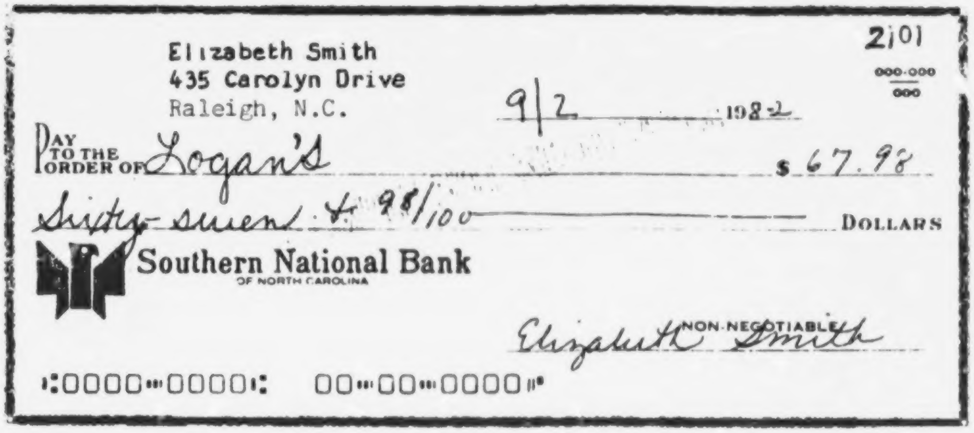
Acceptable ______
Unacceptable ✓

amounts must agree in numbers and words. Signature should be the same as printed name.

TEST ITEM 073-00-13

STUDENT ANSWER SHEET (Continued)

14.



2101

000-000
000

Elizabeth Smith
435 Carolyn Drive
Raleigh, N.C.

9/2 1982

PAY TO THE ORDER OF Logan's $ 67.98

Sixty-seven & 98/100 DOLLARS

Southern National Bank
OF NORTH CAROLINA

NON-NEGOTIABLE

Elizabeth Smith

⑆0000⑈0000⑆ 00⑈00⑈0000⑈

Acceptable ______ ______________________

Unacceptable ______ ______________________

15. Types of unacceptable checks:

(1) ______________________
(2) ______________________
(3) ______________________
(4) ______________________
(5) ______________________

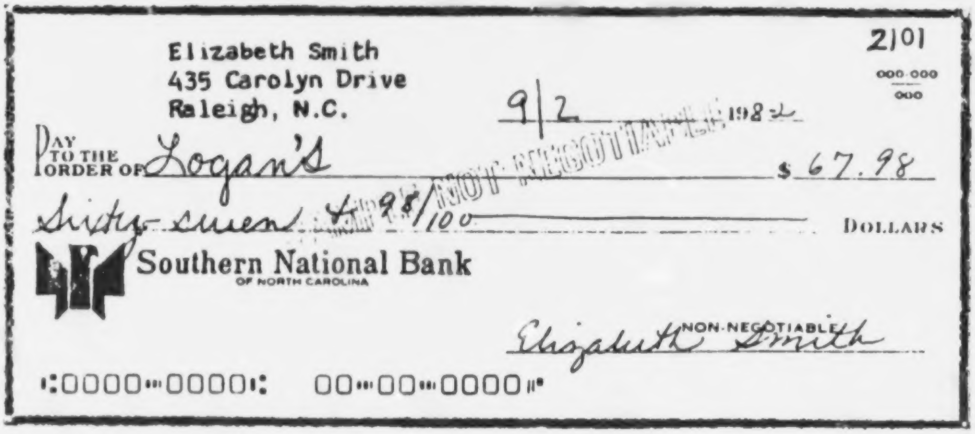
16. What would you suggest that Don do differently?

17. Complete the Inventory sheet in your folder.

**TEST ITEM 073-00-13:** Key

STUDENT ANSWER SHEET (Continued)

14.



2101

000-000
000

Elizabeth Smith
435 Carolyn Drive
Raleigh, N.C.

9/2 1982

PAY TO THE ORDER OF Logan's $ 67.98

Sixty-seven & 98/100 DOLLARS

Southern National Bank
OF NORTH CAROLINA

NOT NEGOTIABLE

NON-NEGOTIABLE

Elizabeth Smith

⑆0000⑈0000⑆ 00⑈00⑈0000⑈

Acceptable ✓

Unacceptable

15. Types of unacceptable checks:
(1) Written in pencil
(2) postdated
(3) payroll
(4) third party
(5) not printed with customer's name

16. What would you suggest that Don do differently?

Get other identification
Check number on check to see if account is new
Call Check Fax because the check number is low
Carefully compare signatures on check with those on identification presented.

17. Complete the Inventory sheet in your folder.

STUDENT ANSWER SHEET (Continued)

18. Closing duties:

(1)________________________________________

(2)________________________________________

(3)________________________________________

(4)________________________________________

(5)________________________________________

(6)________________________________________

(7)________________________________________

(8)________________________________________

19. Complete cash register close out report in your folder.

STUDENT ANSWER SHEET (Continued)

18. Closing duties:
    (1) *Pick up trash left in the stock.*
    (2) *Check dressing rooms and put away all merchandise found.*
    (3) *Put "hold" merchandise in forward stock.*
    (4) *Rack all hangers and move to storage area.*
    (5) *Straighten wrap stand and restock supplies.*
    (6) *Write up defective merchandise.*
    (7) *Close out register.*
    (8) *Wrap front racks.*
19. Complete cash register close out report in your folder.

**TEST** ITEM 073-00-13
(Part 1a)

BUYER'S PURCHASE ORDER

| IN | OUT |
|---|---|
| | |

**SHIP TO & INVOICE** Logan's
STREET 2808 Carolina Avenue
CITY & STATE Raleigh, NC ZIP CODE 27511

**PACKAGE IDENTIFICATION** [illegible]
**STORE NO.** 3

**ORDER GIVEN TO** Arpaja
STREET 78934 Seventh Avenue
CITY & STATE New York, NY ZIP CODE 10411

**DATE OF ORDER** 06/15/8-
**SHIPPING DATE** 09/01/8-

**ORDER NO.** 108856
**DEPT. NO.** 3

**SHIPPING INSTRUCTIONS**
Ship according to guide issued by Traffic Dept., Charlotte, unless otherwise specifically routed below.
SPECIAL ROUTING UPS, FOB vendor

**VENDOR NO.** 632
**Your account will be charged with any excess transportation charges due to your failure to follow instructions. Invoice must show routing of shipment.**

**TERMS:** 2/10, n/EOM
From receipt of invoice or goods, whichever is later. On shipments received on or after the 25th of the month, terms begin as of the first of the following month

| STYLE OR LOT NO. | CLASS | DESCRIPTION — FIBER — COLOR | UNITS AND SIZES 5 | 7 | 9 | 11 | 13 | 15 | QUAN. ORDERED | COST | TOTAL COST | RETAIL PRICE |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 333 | 12 | White l/s poly. blouse | 2 | 5 | 5 | 3 | 2 | 1 | 18 | $15. | $270. | |
| 333 | 12 | Asso. l/s cot. blouse | 3 | 6 | 6 | 4 | 3 | 2 | 24 | $12. | $288. | |
| 271 | 62 | Blk. wool fitted vest | 2 | 4 | 4 | 2 | 2 | 1 | 15 | $15 | $195. | |
| 265 | 32 | B&w wool wrap skirt | 3 | 6 | 8 | 4 | 3 | 2 | 26 | $21. | $546. | |
| 252 | 22 | Wh wool drawst. pants | 2 | 3 | 4 | 2 | 2 | 1 | 14 | $20. | $280. | |

**This Order placed subject to terms and conditions on both sides including all Government regulations.**

| CANCEL AFTER | | | | |
|---|---|---|---|---|
| 09/15/8- | Myra Bumgardner | 3 | $1,579.00 | |
| DATE | BUYER | STORE NO. | TOTAL AMT. OF ORDER | |

No 179

Operations **BUYING OFFICE COPY** 107

TEST ITEM 073-00-13
(Part 1b)

# DUMMY INVOICE

Mfg. Name PRETA PORTA
Address 125690 Selwyn Avenue
Charlotte, North Carolina 28209

Order # 108856
Dept # 5
Packing Slip # 980TR
Date
Authorization M. Bumgardner

| QUANTITY | STYLE # | DESCRIPTION | UNIT COST | Extension |
|---|---|---|---|---|
| 18 | 482 | white, long sleeve poly blouses | $15.00 | $270.00 |
| 24 | 333 | assort. colors, long sleeve cot. blouses | $13.00 | 312.00 |
| 15 | 271 | black wool, fitted vests | $13.00 | 195.00 |
| 26 | 265 | black and white wool wrap skirt | $21.00 | 545.00 |
| 14 | 252 | white wool drawstring pants | $20.00 | 280.00 |
|  |  | TOTAL COST |  | $1,602.00 |
|  |  | DISCOUNT AMOUNT |  |  |

Marked By
Date Marked
Rec'd On Floor By

№ 9801

No. 9360

Operations
108

405

TEST ITEM 073-00-13: Key
(Part 1b)

# DUMMY INVOICE

**Mfg. Name** PRETA PORTA
**Address** 125690 Selwyn Avenue
Charlotte, North Carolina 28209

**Order #** 108856
**Dept #** 5
**Packing Slip #** 980TR
**Date**
**Authorization** M. Bumgardner

| QUANTITY | STYLE # | DESCRIPTION | UNIT COST | Extension |
|---|---|---|---|---|
| 18 ✓ | 482 | white, long sleeve poly blouses | ✓$15.00 | ✓$270.00 |
| 24 ✓ | 333 | assort. colors, long sleeve cot. blouses | ~~$13.00~~<br>12.00 | ~~312.00~~<br>288.00 |
| 15 ✓ | 271 | black wool, fitted vests | ✓$13.00 | ✓195.00 |
| 26 ✓ | 265 | black and white wool wrap skirt | ✓$21.00 | ~~545.00~~<br>546.00 |
| 14 ✓ | 252 | white wool drawstring pants | ✓$20.00 | ✓280.00 |
| | | TOTAL COST | | ~~$1,602.00~~<br>$1,579.00 |
| | | DISCOUNT AMOUNT | | |

**Marked By** 
**Date Marked** 
**Rec'd On Floor By**

№ 9801

No. 9360

TEST ITEM 073-00-13
(Part 1a)

# FREIGHT BILL

## RAINWATER TRANSFER COMPANY

4589 Houston Street
New York, New York 10037

Date August 27 ,198-

| CONSIGNEE | SHIPPER |
|---|---|
| Logan's<br>2808 Carolina Avenue<br>Raleigh, North Carolina 27511 | Arpaja<br>78934 Seventh Avenue<br>New York, New York 10546 |
| Received by S. Smith | Driver R. Bagby |
| Date Sept. 2 Hour 1 p.m. | Carrier No. W78S |
| | Pt. of Origin New York, N. Y. |

| Pieces | Description of Contents | Weight | Rate | Charges |
|---|---|---|---|---|
| 2 | apparel (blouses, vests, shirts and pants) | 45 | $20.00 | Prepaid ☐<br>Collect ☒ |
| Total 2 | ICC Regulations require payment within 7 days | Total 45 | Pay this amount → | $20.00 |

TEST ITEM 073-00-13
(Part 3)

INVENTORY ADJUSTMENT REPORT

No. 251

DATE ________________ Store No. ________ Department No. ________

by ________________________

REASON
(Check one)
___ Returned to Vendor
___ Store Use
___ Sale
___ Destroyed or given to charity
___ Other________________

| STYLE NO. | ARTICLE | QUANTITY | SIZE | OLD PRICE | NEW PRICE | AMT. OF ADJUSTMENT |
|---|---|---|---|---|---|---|
| | | | | | | |
| | | | | | | |
| | | | | | | |
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| | | | | | | |
| | | | | | | |
| | | | | | Total | |

TEST ITEM 073-00-13
(Part 3) KEY

INVENTORY ADJUSTMENT REPORT

No. 251

DATE 9-2-8- Store No. 3 Department No. 3

by Student

REASON
(Check one)
✓ Returned to Vendor
___ Store Use
___ Sale
___ Destroyed or given to charity
___ Other

| STYLE NO. | ARTICLE | QUANTITY | SIZE | OLD PRICE | NEW PRICE | AMT. OF ADJUSTMENT |
|---|---|---|---|---|---|---|
| 265 | b+w Wrap skirt | 1 | 9 | — | — | — |
| 252 | white wool pant | 1 | 7 | — | — | — |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | Total | |

**TEST** ITEM 073-00-13
(Part 3)

RETURN TO VENDOR FORM

Date ____________

Dept. ____________

Store No. ______

Logan's
2808 Carolina Avenue
Raleigh, NC 27511

Address Label

B 11200

Ship To: ______________________________

Charge to: ______________________________

We have charged your account for:

Merchandise returned ____________

Merchandise found short ____________

Merchandise damaged ____________

Reason for Return or Adjustment

______________________________

FROM VENDORS INVOICE

| Date | Amount | Invoice Number |
|---|---|---|
| | | |

| Mfg. Style No. | Quantity | Classification | Description | Unit Price | Total |
|---|---|---|---|---|---|
| | | | | | |
| | | | | | Total |

Number of Pieces ____________

Date Shipped ____________ Signature ____________

TEST ITEM 073-00-13
(Part 3) KEY

**RETURN TO VENDOR FORM**

Date 9-2-8-
Dept. 3
Store No. 3

Logan's
2808 Carolina Avenue
Raleigh, NC 27511

Address Label

8 11200

Ship To: ARPAJA
78934 SEVENTH AVENUE
NEW YORK, N.Y. 10411

Charge to: SAME AS ABOVE

We have charged your account for:

| | |
|---|---|
| Merchandise returned | ✓ |
| Merchandise found short | |
| Merchandise damaged | ✓ |

Reason for Return or Adjustment

FROM VENDORS INVOICE

| Date | Amount | Invoice Number 9801 |
|---|---|---|

| Mfg. Style No. | Quantity | Classification | Description | Unit Price | Total |
|---|---|---|---|---|---|
| 265 | 1 | 32 | WRAP SKIRT | 21.00 | 21.00 |
| 252 | 1 | 22 | PANT - DRAWSTRING | 20.00 | 20.00 |
| | | | | | Total 41.00 |

Number of Pieces 2
Date Shipped 9-2-8-

Signature Student Signature

Operations
114

*Memorandum*

TO:

FROM:

SUBJECT:

DATE:

TEST ITEM 073-00-13
(Part 3) Sample Memorandum

## *Memorandum*

**TO:** Arpaja

**FROM:** Logan's

**SUBJECT:** Defective merchandise (Invoice 9801)

**DATE:** September 2, 198-

Enclosed are two pieces of defective merchandise.

The flaws are as follows:

Style #265 (skirt) - flaw in the material
Style #252 (pant) - one leg shorter than the other.

Please replace these items immediately or credit our account.

Thank you for your attention to this matter.

TEST ITEM 073-00-13
(Part 3)

## DEFECTIVE/DAMAGED MERCHANDISE
## MEMORANDUM RATING SHEET
## RETURN TO VENDOR FORM RATING SHEET

Memo (Total Points: 30)

| | Possible Points | Points Received |
|---|---|---|
| 1. Is the memo effectively written, with all information included? | 15 | ______ |
| 2. Did the participant include the reason for each item being returned? | 15 | ______ |

Return to Vendor Form (Total Points: 70)

Did the student correctly:

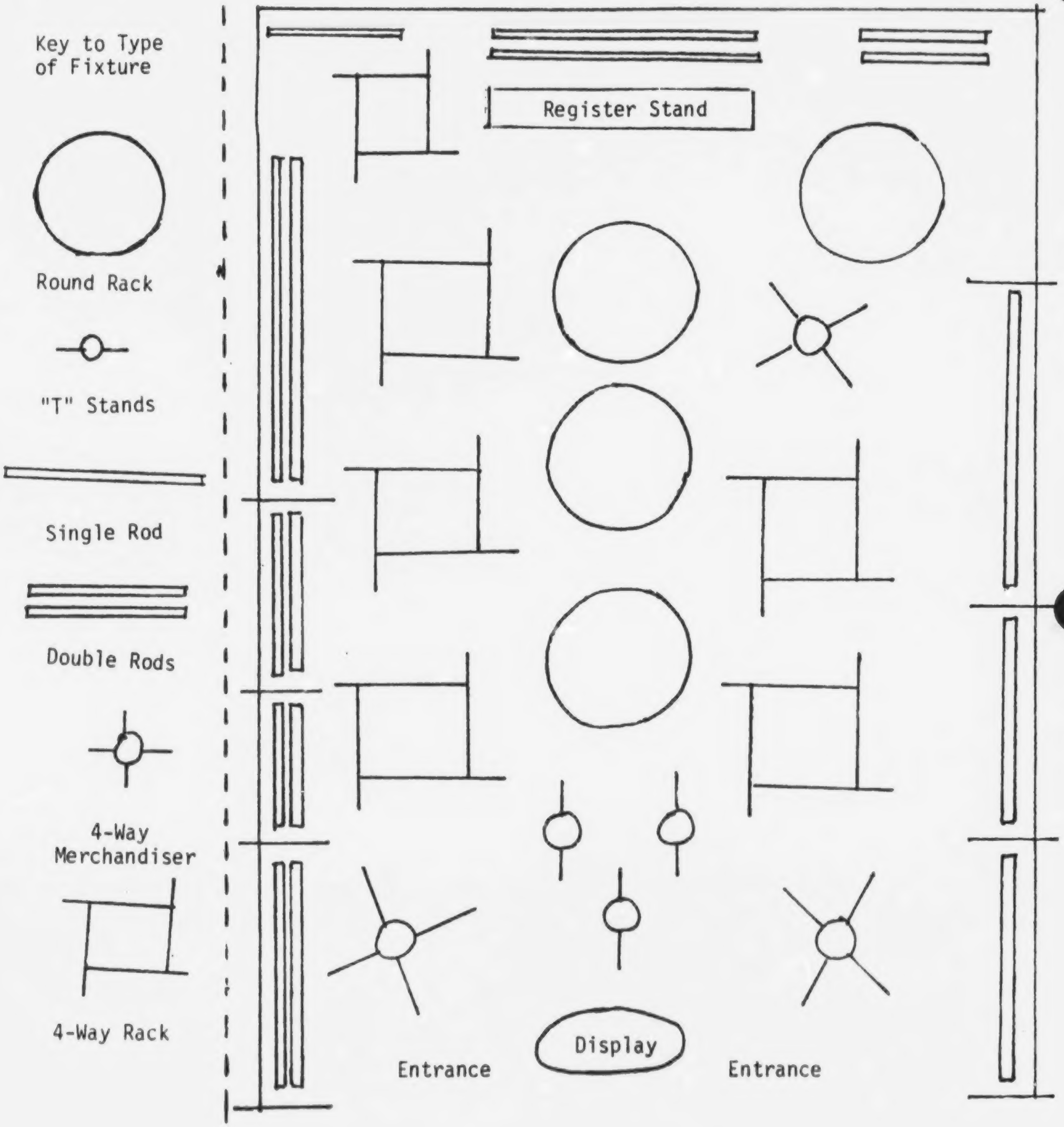
| | Possible Points | Points Received |
|---|---|---|
| 1. Fill in the date and department number? | 5 | ______ |
| 2. Fill in the "ship to" address? | 5 | ______ |
| 3. Fill in the "charge to" address? | 5 | ______ |
| 4. Check both merchandise returned and merchandise damaged? | 5 | ______ |
| 5. Write in the reasons for return and/or refer to the attached memo? | 5 | ______ |
| 6. Fill in the "From Vendor's Invoice" section, including date, amount, and invoice number? | 5 | ______ |
| 7. Complete the section on merchandise being returned, including manufacturer, style numbers, quantity, classification, description, unit price, total. | 30 | ______ |
| 8. Complete bottom section of form, including number of pieces, date shipped, and signature. | 10 | ______ |

TOTAL POINTS RECEIVED ______

TOTAL POSSIBLE POINTS: 100

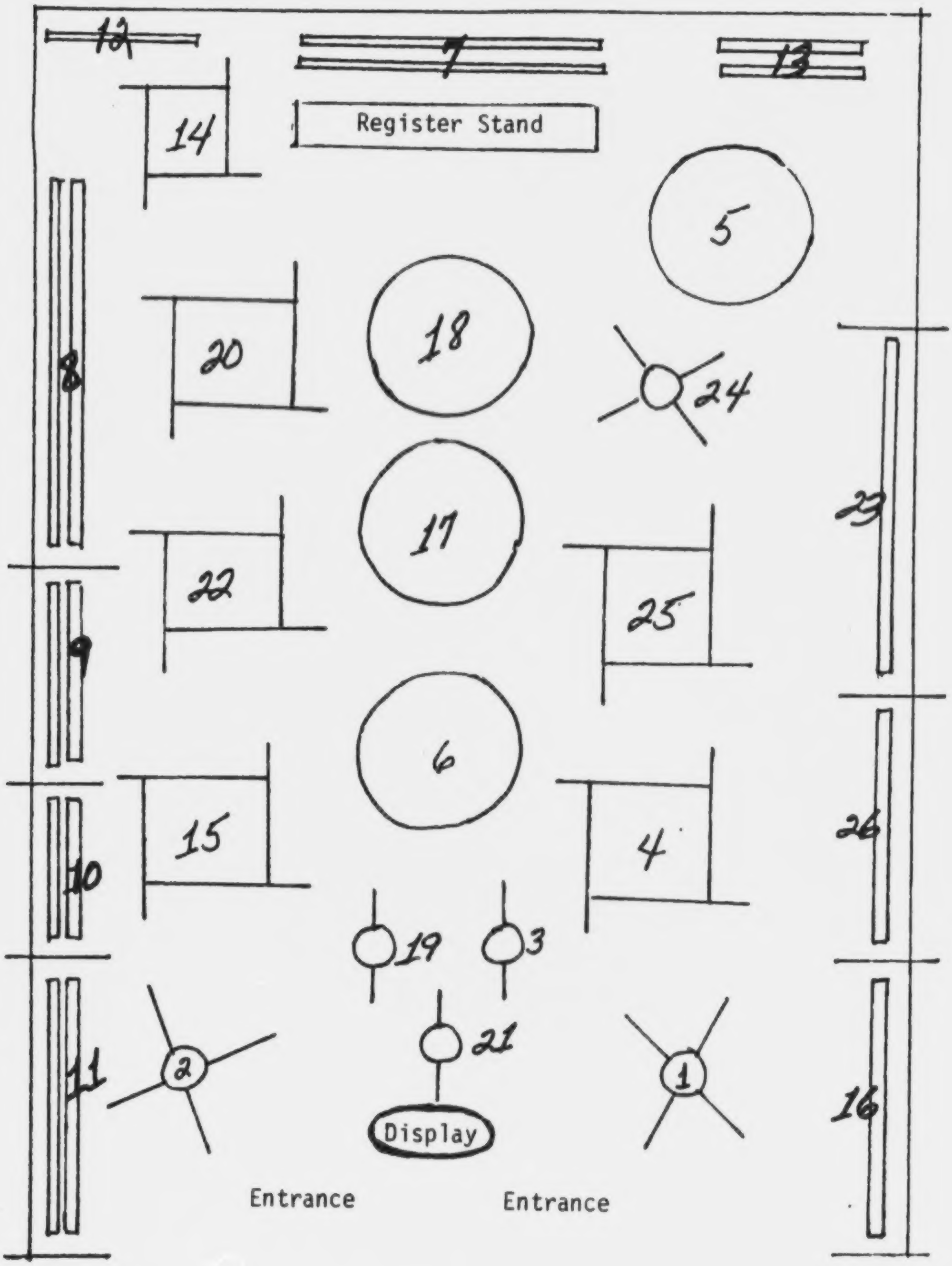
TEST ITEM 073-00-13
(Part 8)

## JUNIOR SPORTSWEAR DEPARTMENT
## FLOOR PLAN


Key to Type of Fixture
Round Rack
"T" Stands
Single Rod
Double Rods
4-Way Merchandiser
4-Way Rack
Register Stand
Display
Entrance
Entrance

TEST ITEM 073-00-13: Key
(Part 8)

## JUNIOR SPORTSWEAR DEPARTMENT
## FLOOR PLAN


12
7
13
14
Register Stand
5
20
18
24
8
17
23
22
25
9
6
15
4
26
10
19
3
21
11
2
1
16
Display
Entrance
Entrance

NOTE TO TEACHER: Answers may vary. Key indicates model answers.

TEST ITEM 073-00-13
(Part 8)

## FLOOR PLAN
## RATING SHEET

Note: Merchandise may be placed in more than one spot and still be acceptable. The main consideration is whether the merchandise is on the right type of fixture, kept within classifications (except coordinated looks) and is in the best area according to store policy. Teacher judgment must be an important part of this rating.

Please rate the student on each of the following items. Circle the appropriate score for each item and total for overall rating.

| Task | Poor | Fair | Good | Excellent |
|---|---|---|---|---|
| 1. Was basic type merchandise placed in the back of the department? | 0 | 1-2-3 | 5-6-7 | 8-9-10 |
| 2. Was sale merchandise within it's classification and placed at the back of that area? | 0 | 3-4-5 | 8-9-10 | 13-14-15 |
| 3. Were new arrivals and high fashion colors placed in the entrance area? | 0 | 1-2-3 | 5-6-7 | 8-9-10 |
| 4. Were "trendy"items placed in the second row of fixtures, or in that general area? | 0 | 1-2-3 | 5-6-7 | 8-9-10 |
| 5. Were classifications kept together, except "go-together" separates on wall rods and coordinated items on 4-way racks and "T" stands? | 0 | 2-4-6 | 9-11-13 | 16-18-20 |
| 6. Were coordinated items placed on 4-way racks or "T" stands? | 0 | 1-2-3 | 5-6-7 | 8-9-10 |
| 7. Were single classifications and clearance sale items placed on round racks? | 0 | 1-2-3 | 5-6-7 | 8-9-10 |
| 8. Were wall rods hung with coordinated looks? | 0 | 1-2-3 | 5-6-7 | 8-9-10 |
| 9. Were shelves merchandised with easily folded merchandise? | 0 | 1-2 | 3-4 | 5 |

TOTAL SCORE ____________

TOTAL POSSIBLE SCORE - 100

TEST ITEM 073-00-13
(Part 11)

# BASIC STOCK LIST

Store No. 3 Dept. No. 3 Item Top Seat jeans

Vendor and address: Top Seat, 1926 Seventh Avenue, New York, NY 10144

| Style No. | Description | Color | Size | Min. qty. | Max. qty. | Retail Price |
|---|---|---|---|---|---|---|
| 496 | Tapered legs | blue d. | 6 | 5 | 12 | $15.98 |
| | | | 8 | 5 | 12 | |
| | | | 10 | 7 | 16 | |
| | | | 12 | 7 | 16 | |
| | | beige c. | 6 | 4 | 10 | $13.98 |
| | | | 8 | 4 | 10 | |
| | | | 10 | 6 | 14 | |
| | | | 12 | 6 | 14 | |
| | | grey c. | 6 | 3 | 8 | $13.98 |
| | | | 8 | 3 | 8 | |
| | | | 10 | 5 | 12 | |
| | | | 12 | 5 | 12 | |
| 497 | straight legs | blue d. | 6 | 5 | 12 | $15.98 |
| | | | 8 | 5 | 12 | |
| | | | 10 | 7 | 16 | |
| | | | 12 | 7 | 16 | |
| | | beige c. | 6 | 4 | 10 | $13.98 |
| | | | 8 | 4 | 10 | |
| | | | 10 | 6 | 14 | |
| | | | 12 | 6 | 14 | |
| | | grey c. | 6 | 3 | 8 | $13.98 |
| | | | 8 | 3 | 8 | |
| | | | 10 | 5 | 12 | |
| | | | 12 | 5 | 12 | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

**LOGAN'S**

## STOCK REQUISITION

Store No. ______ Dept. No. ____ Date ____________ By ________________________

Vendor ________________________________ Class __________

Address________________________________

Merchandise Description ________________________________________

| Style # | Color | Size | Qty. Needed | Style # | Color | Size | Qty. Needed |
|---|---|---|---|---|---|---|---|
| | | | | | | | |

TEST ITEM 073-00-13: Key
(Part 11)

**LOGAN'S**

---

# STOCK REQUISITION

Store No. 3 Dept. No. 3 Date Sept. 2, 198- By Student Name

Vendor Top Seat Class 55

Address 1926 Seventh Ave., N. Y., N. Y. 10144

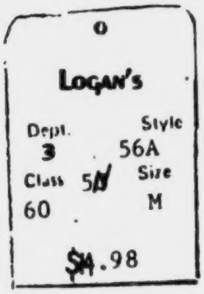
Merchandise Description Jeans

| Style # | Color | Size | Qty. Needed | Style # | Color | Size | Qty. Needed |
|---|---|---|---|---|---|---|---|
| 496 | Beige | 8 | 6 | | | | |
| | | 10 | 10 | | | | |
| | | 12 | 8 | | | | |
| | Grey | 10 | 8 | | | | |
| | | 12 | 8 | | | | |
| 497 | Blue | 6 | 10 | | | | |
| | Denim | 8 | 8 | | | | |
| | | 10 | 9 | | | | |
| | | 12 | 12 | | | | |
| | Beige | 12 | 8 | | | | |
| | Grey | 6 | 6 | | | | |
| | | 10 | 8 | | | | |
| | | 12 | 8 | | | | |

TEST ITEM 073-00-13
(Part 17)

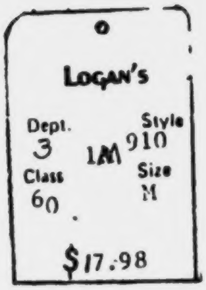
## INVENTORY
## MERCHANDISE DESCRIPTION SHEET

### Ladyette Blouses


LOGAN'S
Dept. 3
Style 56A
5N
Class 60
Size M
$14.98

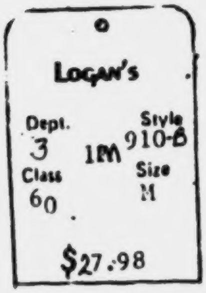
These are long sleeve cotton-plaid.

You have 12 on hand.


LOGAN'S
Dept. 3
Style 910
1M
Class 60
Size M
$17.98

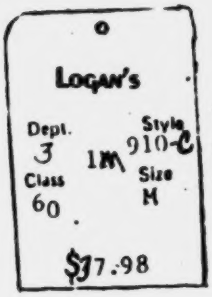
These are long sleeve cotton-with lace collar.

You have 15 on hand.


LOGAN'S
Dept. 3
Style 910-B
1M
Class 60
Size M
$27.98

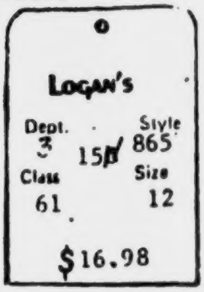
These are long sleeve silk blend.

You have 10 on hand.


LOGAN'S
Dept. 3
Style 910-C
1M
Class 60
Size M
$37.98

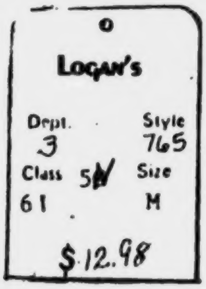
These are long sleeve silk-cowl neck.

You have 12 on hand.


LOGAN'S
Dept. 3
Style 865
15N
Class 61
Size 12
$16.98

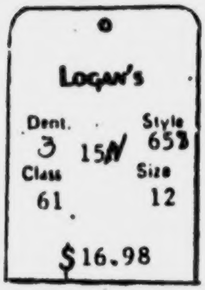
These are short sleeve cotton with lace collar.

You have 20 on hand.


LOGAN'S
Dept. 3
Style 765
5N
Class 61
Size M
$12.98

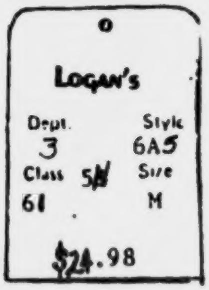
These are short sleeve cotton-stripe.

You have 10 on hand.


LOGAN'S
Dept. 3
Style 653
15N
Class 61
Size 12
$16.98

These are short sleeve poly blend-jewel neck.

You have 12 on hand.


LOGAN'S
Dept. 3
Style 6A5
5N
Class 61
Size M
$24.98

These are short sleeve silk blend-ruffle neck.

You have 8 on hand.

Season code: HAVEFUNTODXY

Day is first, then month.

Fixtures are not numbered.

TEST ITEM 073-00-13
(Part 17)

# LOGAN'S

## INVENTORY COUNTING SHEET

Date____________________

| | Check if recounted | Description | Style No. | Class | Age A,B,X | Unit Retail | Quantity | Extension |
|---|---|---|---|---|---|---|---|---|
| 1 | | | | | | | | |
| 2 | | | | | | | | |
| 3 | | | | | | | | |
| 4 | | | | | | | | |
| 5 | | | | | | | | |
| 6 | | | | | | | | |
| 7 | | | | | | | | |
| 8 | | | | | | | | |
| 9 | | | | | | | | |
| 10 | | | | | | | | |
| 11 | | | | | | | | |
| 12 | | | | | | | | |
| 13 | | | | | | | | |

| | | | | |
|---|---|---|---|---|
| TOTAL SELLING VALUES | A | B | X | Sheet Total |

Called by____________________ Listed by____________________

Recounted by____________________ Extended by____________________

| Store No. | Department No. | Fixture No. | LIST ONE DEPARTMENT PER SHEET |
|---|---|---|---|
| | | | |

TEST ITEM 073-00-13
(Part 17) KEY

# LOGAN'S

## INVENTORY COUNTING SHEET

Date *Sept. 2, 198—*

|  | Check if recounted | Description | Style No. | Class | Age A,B,X | Unit Retail |  | Quantity | Extension |  |
|---|---|---|---|---|---|---|---|---|---|---|
| 1 |  | l/o cot. blouse-plaid | 56A | 60 | A | 14 | 98 | 12 | 179 | 76 |
| 2 |  | l/o-cot blouse/lace | 910 | 60 | A | 17 | 98 | 15 | 269 | 70 |
| 3 |  | l/o silk-blend | 910-B | 60 | A | 27 | 98 | 10 | 279 | 80 |
| 4 |  | l/o silk blend | 910-B | 60 | A | 37 | 98 | 12 | 455 | 76 |
| 5 |  | s/o cot.-lace collar | 865 | 61 | A | 16 | 98 | 20 | 339 | 60 |
| 6 |  | s/o-cot-stripe | 765 | 61 | A | 12 | 98 | 10 | 129 | 80 |
| 7 |  | s/o poly-jewel n. | 658 | 61 | A | 16 | 98 | 12 | 203 | 76 |
| 8 |  | s/o-silk blend-ruf | 6A5 | 61 | A | 24. | 98 | 8 | 199 | 84 |
| 9 |  |  |  |  |  |  |  |  |  |  |
| 10 |  |  |  |  |  |  |  |  |  |  |
| 11 |  |  |  |  |  |  |  |  |  |  |
| 12 |  |  |  |  |  |  |  |  |  |  |
| 13 |  |  |  |  |  |  |  |  |  |  |

| TOTAL SELLING VALUES | A | B | X | Sheet Total |
|---|---|---|---|---|
|  | 2,058.02 |  |  | 2,058.02 |

Called by Don New

Listed by Student Name

Recounted by —

Extended by Student Name

| Store No. | Department No. | Fixture No. | LIST ONE DEPARTMENT PER SHEET |
|---|---|---|---|
| 3 | 3 | — |  |

TEST ITEM 073-00-13
(Part 19)

# LOGAN'S

## CASH REGISTER CLOSE OUT REPORT

| Date | Opening Fund Amount | Store No. | Dept. No. | Register No. | Employee Closing: |
|---|---|---|---|---|---|
| | | | | | |

CASH: List amount at closing less opening fund.

| | |
|---|---|
| Pennies | |
| Nickels | |
| Dimes | |
| Quarters | |
| Half Dollars | |
| Currency | |
| 1. Total Currency and Coins (after removing opening fund) | |
| 2. Total Checks (+) | |
| 3. Total Gift Certificates (+) | |
| 4. Total Paid Outs (+) (attach vouchers) | |

| | |
|---|---|
| Postage | |
| Freight | |
| Supplies | |
| Other | |
| Other | |

| | |
|---|---|
| 5. Refunds (+) (attach tickets) | |
| 6. Cash Voids (+) | |
| 7. Total CASH Sales | |

Cash: _____Proven
_____Over $__________
_____Short $__________

| | |
|---|---|
| 8. Charge Voids (+) | |
| 9. Store Charges | |
| 10. Bank Card Charges | |
| 11. Total Daily Sales (Add lines 7, 8, 9 & 10 | |
| 12. Detail Audit Tape Reading of Total Sales | |

13: Register:
_______ Proven
_______ Over
_______ Short

DAILY SUMMARY

Total Cash Sales ______________
Total Charge Sales______________
Total Sales ______________
Number of Paid Outs______________
Number of Voids ______________
Number of No Sales ______________
Number of Refunds ______________
Reading of Customer Counter ______________
Amount of Average Sales ______________

Comments:

Individual Employee Totals:
Key A__________ Key C __________
Key B__________ Key D __________

TEST ITEM 073-00-13: Key
(Part 19)

# LOGAN'S

## CASH REGISTER CLOSE OUT REPORT

| Date | Opening Fund Amount | Store No. | Dept. No. | Register No. | Employee Closing: |
|---|---|---|---|---|---|
| 9-2-8 | $50 | 3 | 3 | 2 | Student Name |

CASH: List amount at closing less opening fund.

| | | |
|---|---|---|
| Pennies | | 43 |
| Nickels | 7 | 00 |
| Dimes | 10 | 00 |
| Quarters | 8 | 00 |
| Half Dollars | 4 | 00 |
| Currency | 329 | 00 |
| 1. Total Currency and Coins (after removing opening fund) | 358 | 43 |
| 2. Total Checks (+) | 182 | 70 |
| 3. Total Gift Certificates (+) | 10 | 00 |
| 4. Total Paid Outs (+) (attach vouchers) | 20 | 00 |
| 5. Refunds (+) (attach tickets) | 0 | 00 |
| 6. Cash Voids (+) | 57 | 42 |
| 7. Total CASH Sales | 628 | 55 |

| | | |
|---|---|---|
| Postage | | |
| Freight | 20 | 00 |
| Supplies | | |
| Other | | |
| Other | | |

Cash: ____ Proven
____ Over $ ____
✓ Short $ .05

| | | |
|---|---|---|
| 8. Charge Voids (+) | 81 | 27 |
| 9. Store Charges | 179 | 16 |
| 10. Bank Card Charges | 61 | 80 |
| 11. Total Daily Sales (Add lines 7, 8, 9 & 10 | 950 | 78 |
| 12. Detail Audit Tape Reading of Total Sales | 950 | 83 |

13: Register:
____ Proven
____ Over
5¢ Short

DAILY SUMMARY

Total Cash Sales 571.18
Total Charge Sales 240.96
Total Sales 812.14
Number of Paid Outs 1
Number of Voids 7
Number of No Sales 7
Number of Refunds 0
Reading of Customer Counter 68
Amount of Average Sales 11.94

Comments:

Individual Employee Totals:
Key A 452.54
Key B 213.28
Key C 285.01
Key D ____

055-00-11

See Key for Test Item 073-00-13.

055-00-12

| | | |
|---|---|---|
| Customer 1: | navy striped tennis shoe,<br>yellow wedge sandle, | B-4-c<br>A-21-e |
| Customer 2: | white Mary Jane, | OUI, bring<br>C-17-B |

057-00-11

See Key for Test Item 073-00-13 (Part 8).

058-00-11

See Key for Test Item 073-00-13 (Part 9).

058-00-12

Weekly: Wash plants and water them, wax rods, dust baseboards and dressing rooms, sweep and mop storage and office areas, clean bathrooms, move fixtures and vacuum.

Daily: Dust all furniture, fixtures and ledges, clean mirrors and glass, sweep, vacuum, remove trash, and polish chrome.

Teacher judgment depending upon class discussion.

059-00-11

See Key for Test Item 073-00-13 (Part 10).

060-00-11

See Key for Test Item 073-00-13 (Part 11).

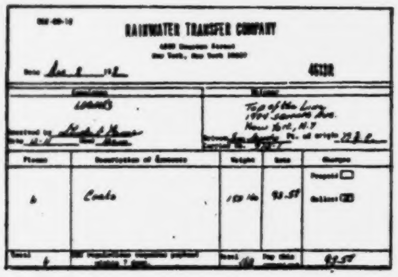
061-00-11

See Key for Test Item 073-00-13 (Part 18).

062-00-11

See Key for Test Item 073-00-13 (Part 1).

062-00-12



RAINWATER TRANSFER COMPANY

Top of the Line

New York, N.Y.

Coats

93.50

062-00-13

| | | |
|---|---|---|
| 1. | Person or business buying the merchandise | buyer's order form |
| 2. | Number taken from the buyer's purchase order | buyer's order form |
| 3. | When the bill is due and the amount and due date of the discount that the buyer can get, if any | the vendor sets |
| 4. | How the merchandise is sent and who pays for the transportation costs | agreed upon by the retailer and vendor |
| 5. | How many boxes, cartons, etc. the shipment was sent in | vendor |
| 6. | How many items were sent | vendor |
| 7. | Number assigned to a certain style of apparel helps to identify a specific style | vendor-will be on buyer's order |
| 8. | Brief description of the merchandise to help identify it | vendor-will be on buyer's order |
| 9. | The cost to the retailer of one item of a specific style | vendor-will be on buyer's order |
| 10. | Unit cost multiplied by the quantity of each style. Will be the total amount that the retailer will have to pay for each style | Vendor |
| 11. | Total of all extensions | |
| 12. | Amount the retailer must pay the vendor for the merchandise. Will have the discount amount subtracted, if there is one | Vendor |

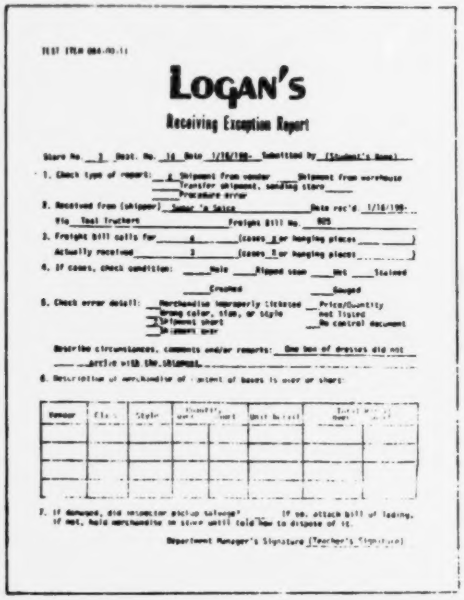
063-00-11

1. Count the items and see that the quantity is the same as on the invoice.
2. Compare the invoice with the buyer's purchase order to see that the items sent were the items ordered.
3. Verify the arithmetic calculations.
4. Check for physical damage of the merchandise.

063-00-12

See Key for Test Item 073-00-13 (Part 1).

064-00-11



LOGAN'S

Receiving Exception Report

Store No. 3 Dept. No. 14 Date 1/16/198- Submitted by (Student's Name)

1. Check type of report: x Shipment from vendor ___ Shipment from warehouse
___ Transfer shipment, sending store ___
___ Procedure error

2. Received from (shipper) Sugar 'n Spice Date rec'd 1/16/198-
Via Teal Truckers Freight Bill No. 825

3. Freight bill calls for 4 (cases x or hanging pieces ___)
Actually received 3 (cases X or hanging pieces ___)

4. If cases, check condition: ___ Hole ___ Ripped seam ___ Wet ___ Stained ___ Crushed ___ Gouged

5. Check error detail: ___ Merchandise improperly ticketed ___ Price/Quantity not listed ___ Wrong color, size, or style ___ No control document X Shipment short ___ Shipment over

Describe circumstances, comments and/or remarks: One box of dresses did not arrive with the shipment.

6. Description of merchandise or content of boxes if over or short:

| Vendor | Class | Style | Quantity Over | Quantity Short | Unit Retail | Total Retail Over | Total Retail Short |
|---|---|---|---|---|---|---|---|
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |

7. If damaged, did inspector pickup salvage? ___ If so, attach bill of lading. If not, hold merchandise in store until told how to dispose of it.

Department Manager's Signature (Teacher's Signature)

BEST COPY AVAILABLE

### 065-00-11

1. A
2. D
3. A
4. C
5. C
6. B
7. A
8. B
9. D
10. C

### 065-00-12

See Key for Test Item 073-00-13 (Part 3).

### 065-00-13

1. Used when the damage is discovered during receiving.
2. Sent to vendor prior to returning the merchandise to get permission to return the merchandise.
3. Pinned to the merchandise as soon as the damage is discovered.
4. Filled out when the merchandise is marked out of stock or marked down.
5. Sent when the merchandise is actually being returned to the vendor.

### 067-00-11

1. B
2. A
3. D
4. D
5. First, B; Second, C; Third, A

### 067-00-12

See Key for Test Item 073-00-13 (Part 5)

### 068-00-11

1. C
2. G
3. H
4. A
5. B
6. I
7. F
8. D
9. E

### 068-00-12

Rating will be devised by the teacher according to the procedure for your cash register.

### 068-00-13

See Key for Test Item 069-00-13.

### 069-00-11

See Key for Test Item 073-00-13 (Part 12).

### 069-00-12

See Key for Test Item 073-00-13 (Part 13).

### 069-00-13

Use rating sheet. The student should reach a proficiency rating of 80.

### 070-00-11

1. Detail audit tape
2. At the end of a selling day
3. Proven
4. Cash
5. Opening fund

### 070-00-12

See Key for Test Item 073-00-13 (Part 19)

### 070-00-13

1. Amount that was placed in the register at the beginning of the day for the purpose of making change. Information on the Opening Fund Verification Form found in cash drawer.
2. **Cash that was taken in during the day. Found in cash drawer and figured after opening fund has been removed.**
3. Money that was paid out of the register during the day. Vouchers for that amount of money will be found in cash drawer.
4. Errors made during cash sales. Found in cash drawer.
5. Total cash sales for the day. Found by adding lines 1, 2, 3, 4, 5, and 6.
6. Indicates whether you have the right amount of cash in the drawer, as compared to the detail audit tape. Tape is found inside register and it is compared to the amount on line 7.
7. Amount of money charged on store charge accounts. Sales tickets are found in cash drawer.
8. Total amount of sales for the day. Found by adding lines 7, 8, 9, and 10.
9. Tells how much the cash register says the total sales should be. Found inside the register.
10. Indicates whether the amount on line 12 agrees with the amount on line 11.
11. Total amount charged for the day. Found by adding lines 9 and 10.
12. Tells individual sales totals for the employees using this register. Found on the detail audit tape.

### 071-00-11

1. Check number - Should be high number; question low numbers, by carefully checking all other identification, etc.
2. Customer name, address and phone number - Usually needs to be printed on the check.
3. Date - Must be current; accept no post dated checks.
4. Payee - Person or business to whom check is written; Must be to the store; Accept no 3 party checks.
5. Amount in words and numbers that the check is worth - Amounts must agree with each other and be written so that they can be read.
6. Signature - Must agree with customer's identification and with the name printed at the top of the check.

### 071-00-12

See Key for Test Item 073-00-13 (Parts 15 and 16).

### 071-00-13

See Key for Test Item 073-00-13 (Part 14).

### 072-00-11

Check the expiration date on the card; check the list of stolen and lost cards; ask to see other identification such as a drivers license and compare signatures and pictures, call the bank card company for authorization anyway.

### 072-00-12

1. Check signatures, Call the credit office for authorization, Ask for other identification and compare.
2. Do not return the card
3. (1) Customer doesn't have to pay for the purchase if it is not signed
   (2) Gives the salesperson a chance to compare the sales ticket signature with that on the charge card.
4. The salesperson should visit the credit office to get more information. Apologize, and explain that it could be the store's mistake.
5. The highest amount that a customer can charge at one time and not have to have the purchase authorized.

### 073-00-11

1. C
2. C
3. B
4. A
5. D
6. D

073-00-12

1. True
2. True
3. False
4. True
5. True

073-00-13

Will be found on the back of the appropriate student answer sheet or immediately following each form that needs to be completed.

# PRINTED REFERENCES

# PRINTED REFERENCES FOR MERCHANDISING OPERATIONS

TEXT:

| | |
|---|---|
| Edison and Mills. Checker Cashier, Cincinnati: South-Western Publishing Company, 1969. | PR-1 |
| Mathisen, Marilyn. Apparel and Accessories. New York: McGraw Hill Book Company, 1979. | PR-2 |
| Moffett, Carol Willis. Getting Merchandise Ready for Sale. New York: McGraw Hill Book Company, 1969. | PR-3 |
| Stockkeeping. Austin, Texas: University of Texas, 1957. | PR-4 |
| Stull, William A. Marketing Math. Cincinnati: South-Western Publishing Company, 1979. | PR-5 |
| Vonndran/Litchfield. General Merchandising Retailing. New York: McGraw Hill Book Company, 1979. | PR-6 |

SIMULATIONS:

| | |
|---|---|
| Koeniger, Jimmy G. and Thomas A. Hyshner. Jefferey's Department Store--A Retailing Simulation. New York: McGraw Hill Book Company, 1978. | PR-7 |

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# SALES PROMOTION

I. Broad Content Outline, Competencies, and Objectives . . . . . . 1

II. Detailed Content. . . . . . . . . . . . . . . . . . . . . . . . . 3

III. Student Activities . . . . . . . . . . . . . . . . . . . . . . 13

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Marketing and Distributive Education

Fashion Merchandising - 7271
Fashion Merchandising and Management - 7272

| COMPETENCY STATEMENT | 7271 | C | S | CO |
|---|---|---|---|---|
| I. Introduction to Sales Promotion | | | | |
| A. Purposes of Sales Promotion | | | | |
| 074 Identify the uses and purposes of sales promotion. | | X | | |
| The student will list the broad purposes of sales promotion. | | | | |
| The student will match the specific purposes of sales promotion with examples of promotional activities. | | | | |
| The student will define personal and nonpersonal promotion. | | | | |
| B. Forms of Sales Promotion | | | | |
| The student will identify the various forms of sales promotion and advantages and disadvantages of each. | | | | |
| II. Visual Merchandising | | | | |
| A. Orientation | | | | |
| 075 Develop display ideas congruent with the purposes or uses identified. | | | X | |
| The student will identify display objectives. | | | | |
| The student will distinguish between mass and fashion displays. | | | | |
| The student will develop a mass and/or fashion display. | | | | |
| B. Art Elements and Principles of Design in Display | | | | |
| 076 Identify the basic art elements of display and the principles of design. | | | | X |
| The student will recognize art elements and their characteristics. | | | | |
| The student will label principles of design at work in display illustrations. | | | | |
| The student will use art elements and design principles in creating effective displays. | | | | |
| C. Interior Display and Store Arrangement | | | | |
| 077 Highlight advertised items on shelves and displays. | | X | | |
| The student will explain the purpose and importance of highlighting an advertised item in a display. | | | | |
| 078 Select appropriate display fixtures, props, and backgrounds. | | | | X |
| The student will label the various props used in a display according to their function. | | | | |
| 079 Plan location of displays considering logical groupings, maximum customer exposure, present and anticipated sales volume, in keeping with the store layout. | | X | | |
| The student will suggest appropriate display locations. | | | | |
| 080 Develop point-of-purchase signs (show cards) and banners. | | | | X |
| The student will recognize the qualities of a good show card. | | | | |
| The student will prepare a good point-of-purchase sign. | | | | |
| D. Display Planning | | | | |
| 081 Obtain information and materials for displays. | | | | X |
| 082 Select merchandise for display that is seasonal and timely. | | X | | |
| The student will choose a seasonal display theme and plan merchandise accordingly. | | | | |
| The student will list the sources for display themes. | | | | |

Marketing and Distributive Education

Fashion Merchandising - 7271
Fashion Merchandising and Management - 7272

| COMPETENCY STATEMENT | 7271 | C | S | CO |
|---|---|---|---|---|
| 083 Coordinate displays with other promotional activities.<br>The student will determine if a display is coordinated with other promotional activities.<br>The student will select the display that is most appropriate for a promotional campaign.<br>The student will describe a display that could be coordinated with a special event. | | X | | |
| 084 Display merchandise appropriately.<br>The student will identify the characteristics of display arrangements. | | | | X |
| 085 Build displays.<br>The student will list in proper sequence the steps to building a display.<br>The student will construct a miniature window display. | | | | X |
| E. Display Maintenance<br>086 Prepare merchandise for display including pressing, repairing, etc.<br>The student will identify proper procedures in preparing merchandise for display. | | | | X |
| 087 Maintain sales appearance of displays by rearranging when necessary or replacing merchandise sold from displays.<br>The student will identify the procedures used when replacing merchandise sold from displays. | | | X | |
| 088 Use housekeeping procedures necessary for the proper upkeep of department displays of merchandise.<br>The student will identify housekeeping procedures. | | X | | |
| 089 Evaluate the effectiveness of display by analyzing sales results with regards to the purpose of the display.<br>The student will evaluate the effectiveness of the displays by analyzing sales results. | | | | X |

PLANNING NOTES

I. Introduction to Sales Promotion

A. Purposes of sales promotion

(TM-1)
[CTIB 074-00-11]

1. **Broad purposes** (All broad purposes should be present in each form of sales promotion).
    a. Sell a product, service, or idea at a profit.
    b. Build customer allegiance to the store.
    c. Arouse customer interest for the product, service, or idea.
    d. Provide information to prospective customers.
    e. Promote the image of the store.
2. Specific Purposes (One or several specific purposes is present in any one sales promotion activity).

    [CTIB 074-00-12]

    a. Introduce new products.
        (1) A new line of makeup may be promoted by having a free "make over" available to customers in the cosmetic department.
        (2) A new food processor may be promoted by a cooking demonstration held in the housewares department.
    b. Indicate product assortments.
        (1) A display may feature all the colors available in a line of sport shirts for men.
        (2) A spring advertisement may feature assorted straw handbags in various sizes, shapes, prices.
    c. Present special offers, prices, and conditions of sale.
        (1) A television commercial may feature the special offer of one free pair of childrens' shoes with the purchase of one pair at the original price.
        (2) Direct mail sent to homes may advertise a special half price sale.
    d. Coordinate related products.
        (1) A window display may coordinate accessories with apparel.
        (2) A magazine advertisement may feature the "total" look for men for fall.
    e. Attract new customers.
        (1) A fashion show for the "large sized" woman may feature clothes from a new department in the store.
        (2) A bicycle giveaway may be held in the sports department to encourage preteen shoppers.
    f. Identify brands.
        (1) An advertisement may feature designer jeans.
        (2) Free perfume samples may be given away in the cosmetics department.
    g. Establish the store as a fashion authority.
        (1) An advertisement may feature a designer trunk showing in the better dress department.
        (2) A fashion show may feature the latest fall/winter looks.
    h. Render community service.
        (1) A store may sponsor a marathon to raise money for a local charity.
        (2) A store may support the local symphony by sponsoring a Symphony Day.
    i. Give useful information on use of product.
        (1) An advertisement may feature facts and selling points about the product.
        (2) A demonstration may be given on how to use a product.
    j. Reach persons who influence the purchaser.
        (1) Commercials are featured on Saturday morning during cartoons for children's products.
        (2) Jewelry advertisements are placed in women's magazines.
3. Nonpersonal promotion (Communications are sponsored by a store that reaches many prospective customers by various media).

PLANNING NOTES

4. Personal promotion (Face to face communication occurs between the store's representative and a customer usually at the point-of-sale).

[CTIB 074-00-13]

B. Forms of Sales Promotion

1. Publicity (Verbal or written nonpaid mention of a company, product, or service is made in public information media).

   a. Advantages include:

      (1) Can create, develop, and maintain goodwill.
      (2) Establishes a belief in all forms of sales promotion (paid and unpaid) presented by the company.
      (3) Communicates to the public what a company is doing in the public's interest.
      (4) Printed or spoken at no charge to the company.

   b. Disadvantages include:

      (1) Lack of control.
      (2) Does not direct when, where, or how the message appears.
      (3) Discourages customer trade, if poor.

2. Advertising (Paid message is sent to a mass audience of potential customers by an identified sponsor).

   a. Advantages include:

      (1) A large number of potential buyers.
      (2) Presales of a product, service, or idea so that less time is needed for personal selling.
      (3) Drawing customers into the store to look at merchandise and to the point of personal promotion/selling.
      (4) Control by the company that pays for and sponsors it.
      (5) Information to help the customer select the right product.
      (6) Reduction of other expenses by creating more business.
      (7) Gaining acceptance of new products, services, or ideas.
      (8) Reduction of per unit selling expenses by allowing more efficient use of facilities.

   b. Disadvantages include:

      (1) Results cannot be determined immediately.
      (2) Intended customer not always reached.
      (3) Considerable expense and coordinated efforts are involved.

3. Visual Merchandising (A nonpersonal physical presentation of merchandise is made at the point-of-sale).

   a. Advantages include:

      (1) The merchandise is seen by customers.
      (2) The merchandise can be handled.
      (3) Mannequins that show how a garment will look when worn and accessorized.
      (4) Customer convenience in asking questions.
      (5) Window displays that continue to sell even after the store has closed.

   b. Disadvantages include:

      (1) Merchandise may often be damaged, soiled, or stolen.
      (2) Merchandise may not be seen unless people intentionally visit the store or are attracted to the point-of-sale by other forms of sales promotion.
      (3) Daily maintenance and upkeep.

4. Special Events (Special demonstrations, exhibits, attractions, service or sales inducements promote the sale of a product, service, or idea).

(TM-2)

   a. Advantages include:

      (1) The increase of store traffic.
      (2) Interest in educational and entertaining events are developed.
      (3) A constant interest in the store and its activities.
      (4) Opportunities to receive free publicity by local media.
      (5) Provides merchandising impact when used in conjunction with other means of sales promotion.

PLANNING NOTES

b. Disadvantages include:
  (1) Thorough planning and coordination are required.
  (2) A large budget may be required.

5. Personal Selling (Face to face communication occurs between the store's representative and customers).

a. Advantages include:
  (1) First hand customer reactions and impressions.
  (2) Personal attention and service is offered customers.
  (3) Immediate response to customer's questions.
  (4) Increased sales by suggesting additional merchandise.
  (5) Completion of the sale.
  (6) Overcoming objections to the sale.

b. Disadvantages include:
  (1) Sales lost by unqualified, uninformed sales personnel.
  (2) Expense of sales promotion.
  (3) Preference of customers for simplified selling/self-service.

II. Visual Merchandising

A. Orientation

1. Display ideas congruent with the identified purposes [CTIB 075-00-11]

a. Display objectives include:
  (1) Promotions are designed to produce immediate sales and feature current merchandise with timeliness.
  (2) Institutional events and themes of public interest attempt to create a feeling of goodwill toward the store. (PR-3; pp. 170-175, 184)

b. The store image indicates the personality the store wants to impart to the customer. [CTIB 075-00-12]
  (1) Mass displays are made up of related items.
    (a) Large amounts of merchandise are crowded in the display.
    (b) Often no spacing is left between groupings.
    (c) Items have high volume sales potential.
    (d) Mass displayed items suggest buying to customers.
    (e) The display suggests a sale, a special promotion, or budget prices. (TM-3)(TM-4)
  (2) Fashion displays add to the store's prestige.
    (a) Less merchandise is displayed.
    (b) Large amounts of unused space are allowed.
    (c) Higher prices are reflected. (SA-1)

B. Art Elements and Principles of Design in Display (TM-5)

1. Art Elements

a. Space is an area where there is a void. (SA-2)
  (1) Space is essential in design because of the physical and mental relief it provides.
  (2) Space in a display can be obtained by solid, subtle color used on the walls, in fabrics, and on paper.
  (3) Neutral colors and smooth textures usually offer good space in a display.
  (4) Space in a display can occur between objects in the window.
  (5) Mass merchandise displays have very little space opposed to the fashion display where there is more emphasis given to space.

b. Form is the shape of things and falls into four categories.
  (1) Geometric forms are made up of lines.
  (2) Naturalistic forms are real or appear real.
  (3) Stylized forms look like a form in nature but do not appear life-like or real.
  (4) Abstract forms do not relate to anything in nature and are not geometric in form. (SA-3)

PLANNING NOTES

c. Lines create certain feelings that are important to the impact of the display.

  (1) Curved lines create a feeling of femininity because they are representative of the female body.

    (a) Curved lines suggest other forms that are found in nature.
    (b) Curved lines suggest movement, elegance, softness, and spontaneity.

  (2) Straight lines create a masculine feeling because they are representative of the male body.

    (a) Straight lines that are vertical create a formal atmosphere, add height, suggest boldness and strength.
    (b) Straight lines that are horizontal create a relaxed atmosphere, add width, suggest tranquility and stability.
    (c) Straight lines that are diagonal create an insecure feeling if used alone in a display and must have support from another diagonal line or a vertical line.

d. Texture is the visual feel or surface quality of an object. (SA-4)

  (1) Textures creating formal feelings are smooth, shiny, etc.
  (2) Textures creating informal feeling are dull, bumpy, rough, etc.
  (3) Textures creating masculine feelings are tough, hard, coarse, etc.
  (4) Textures creating feminine feelings are smooth and soft.

e. Color is powerful, expressive tool of visual merchandising.

  (1) Warm colors are red, orange, and yellow and their variations.

    (a) Warm colors tend to come forward and are noticed more.
    (b) Warm colors make objects appear closer and larger.
    (c) Warm colors suggest action, movement, and informal feelings when used in high intensity. (SA-5)

  (2) Cool colors are green, blue, and purple and their variations.

    (a) Cool colors suggest relaxation.
    (b) Cool colors create an illusion of space.
    (c) Cool colors offer less distraction and suggest a formal, stately feeling.

  (3) Colors have personalities and emotional meaning.

    (a) Yellow indicates sunshine, heat, and happiness.
    (b) Blue indicates coolness, sky, water, and calmness.
    (c) Orange indicates harvest, vitality, tension, and action.
    (d) Green indicates coolness, plants, springtime, and nature.
    (e) Red indicates fire, warmth, action, excitement, danger, and passion.
    (f) White indicates purity and cleanliness.
    (g) Purple indicates royalty, seriousness, and richness.
    (h) Pink indicates ruffles, kindness, and softness.
    (i) Gray indicates dullness, quietness, and formality.

  (4) Colors must be seen in contrast to be easily distinguished from each other. (SA-6)

2. Principles of Design (TM-6)

a. The shape of items in a display must be functional or have a definite purpose that is appropriate for its use.

  (1) The shape of the display case should be designed so that functional and decorative props will fit adequately.
  (2) Most mannequins are designed to be easily dismantled for quick changing of the merchandise.
  (3) Display cases (closed back) are usually covered with cork or some other material in which staples, pins, and thumbtacks can be placed.

b. Variety in Unity is sometimes referred to as "Harmony".

  (1) Variety is created when different aspects of each art element are used in a display.
  (2) Unity is created when the same art elements are repeated in a display.

c. Balance is the arrangement of merchandise and props around the center of the display in such a way that their weights will balance when they are equally distributed.

(1) Symmetrical or Formal Balance is achieved when objects of similar size and weight are placed on both sides of the display window or space.
(2) Asymmetrical or Informal Balance is created when objects of varying size, weight, or quantity are placed on both sides of a display, and they achieve balance of size and weight.

d. Rhythm creates eye movement that has an easy, fluid pattern. (TM-7)

(1) Repetition repeats a single element over and over again in a regular pattern spaced equally apart.
(2) Alternation is a form of repetition with the art elements slightly varied.
(3) Progression is the placement of similar items in varying sizes next to each other in a steplike arrangement.

e. Emphasis is created when the eye is guided to a certain point of interest (focal point) in the display. (TM-8)
f. Proportion shows how one object used in a display relates or compares in size to another object and how they each compare to the display as a whole. (HO-1)
g. Scale is determined when you compare an object to the average in life.

C. Interior Display and Store Arrangement

1. Types of Promotional Interior Displays

a. An assortment display:

(1) Is geared toward a self selection operation.
(2) Gives customer the opportunity to select and buy different types of merchandise.
(3) Is much like a mass display.

b. A fashion display:

(1) Concentrates on one or several related items of apparel and accessories.
(2) Attracts customer interest by effective use of light and color, artistic arrangement of mannequins and the correct use of accessories.

c. An impulse display:

(1) Arouses customer interest and desire to buy an item he/she had not planned to purchase.
(2) Is located where they will be easily seen by a number of people.
(3) Is labeled and clearly signed so it will attract even disinterested passersby.
(4) Can be a mass or fashion display.

d. An environmental display:

(1) Places merchandise in lifelike settings.
(2) Depicts ownership of merchandise.
(3) Is especially suited for furniture.

2. Fixtures for Interior Displays

a. A showcase display:

(1) Can be classified as a glass case, glass wall case, shadow box or interior window.
(2) Is inaccessible to the customer.
(3) Is used for fragile and easily soiled merchandise.
(4) Is used for expensive items such as jewelry to cut down on theft.

b. A counter display:

(1) Allows the customer to handle the merchandise.
(2) Assists the salesperson in illustrating selling points.
(3) Should be small so the display does not block the view of other merchandise beneath the glass counter or interfere with selling.
(4) Typically features currently advertised items.
(5) Is an effective location for impulse items.
(6) Is located on top glass of glass selling case.

PLANNING NOTES

c. A ledge or wall display:
    (1) Is usually located above the normal eye level of customers.
    (2) May be used to draw attention to a particular line of goods or to display small items.
    (3) May help customers locate department from a distance.
    (4) Is often used for seasonal decorations.
    (5) Is relatively expensive to construct.
    (6) May be used to hold decorative signs and banners.
    (7) May be used to hold pinned or draped merchandise.

d. A hanger display:
    (1) Is suspended from the ceiling.
    (2) Is practical in stores where display space is limited.
    (3) Must be small and confined to a few items to avoid a cluttered appearance.

e. An open bin:
    (1) Allows customers to see and examine the merchandise.
    (2) Encourages impulse buying.

f. An island display (platforms):
    (1) Is an isolated display placed amid the shelves and counters to highlight merchandise.
    (2) Is placed at areas of concentration for effect.
    (3) Is used to show featured merchandise and related items.
    (4) Should not be used as stock areas or crowded with boxes and signs.
    (5) May or may not have a background.
    (6) Is often finished with carpet, grass, linoleum or wood.
    (7) Should be well illuminated, not crowded.

g. A point-of-purchase (POP) display:
    (1) Is often developed by manufacturer for retailer use.
    (2) Is most often seen as customer self service units.
    (3) Stimulates impulse purchases.

3. Props for displays

    a. Functional props are used to display wearing apparel and/or hold merchandise.
        (1) Mannequins are full figured forms and are not flexible. (SA-2)(HO-2)
        (2) Body forms represent a part of the human body and are often used as space saving devices. (SA-7)
        (3) Display stands can be adjusted to various heights.
        (4) Racks can be round, cross-bars, or a "T" form.

    b. Decorative props may hold merchandise but their primary objective is to present a display atmosphere. (PR-2; pp. 172-175)
        (1) Can be used to establish a mood or setting for merchandise.
        (2) May or may not be for sale.

    c. Structural props support functional and decorative props.
        (1) Are architectural in design.
        (2) Can change the physical appearance of the display. (SA-8)

4. Display Backgrounds

    a. The purposes of the background are:
        (1) To create appropriate enviornment for merchandise being displayed.
        (2) To help unitize the merchandise being displayed.

    b. Factors to consider when planning: (HO-3)
        (1) The store image.
        (2) The amount of money that has been budgeted.
        (3) The type of merchandise to be displayed.
        (4) Length of time display is to be used.
        (5) Size and type of display window or store space.
        (6) Architectural nature of window or store space.
        (7) Type of material used in construction.

5. Principles of Interior Display
    a. Fixtures, mannequins, and props are orchestrated to bring the merchandise into the spotlight.
    b. Visual merchandising should allow for ease of selection and self-service.
6. Locations of Interior Displays
    a. The area between the entrance and the escalator/elevator is the most important selling space on the main floor.
    b. Impulse items and featured advertised items should be placed at locations that neighbor traffic patterns.
    c. In the highly traffic area, the merchandise must be changed frequently.
    d. Windows-on-the-Aisle are the primary area of presentation and are located at the front of a department.
        (1) Fixtures and merchandise must make strong fashion statement and provide immediate interest and excitement.
        (2) Fixtures are kept low in height to allow a view into the department.
        (3) The merchandise should be "facing out" to the aisle.
        (4) Stocks on these fixtures are limited.
        (5) Coordinated outfits are out front on each fixture.
    e. The bread-and-butter display area is the center of a department.
        (1) Mass merchandising of large coordinated groups are located in this core area.
        (2) Fixtures include rounders, 4-ways, and other fixtures that allow great stock capacity.
        (3) The heights of these fixtures may be varied to allow more visual impact.
        (4) Color coordinated merchandise on these fixtures are sized within each color group.
        (5) Fixtures are removed as stock quantities decrease.
        (6) Sale or promotional racks are located in this area to draw customers into the department.
    f. Vistas are located on the back walls of the department and can be seen from the aisle. (HO-4)
        (1) Should be visually interesting enough to entice the customer into the department.
        (2) Must offer variety.
        (3) Should avoid one level of presentation.
        (4) Should create focal points for the department.
        (5) Color is of prime importance in arranging merchandise. [CTIB 079-00-11]
7. Point-of-Purchase signs (show cards)
    a. A good show card: (SA-2)
        (1) Serves as a silent salesperson.
        (2) Tells what the product is, its benefits, and the cost.
        (3) Is factual and informative.
        (4) Tells about the product from the customers' viewpoint.
        (5) Stands out and is large enough to be easily read.
        (6) Keeps display information fresh and attractive. (TM-9)(TM-10)
    b. Parts of a show card include:
        (1) A lead-in line that identifies the main benefit of the product. (HO-5)
        (2) A headline that identifies the merchandise, often by the brand name.
        (3) The body copy that tells the features of the merchandise. (SA-9)
        [CTIB 080-00-11]
        (TM-11)

D. Display Planning
1. The theme (SA-2)
    a. Sources include the merchandise to be displayed, special events/promotions, dealer aids, customers, fashion periodicals, and own creativity. [CTIB 082-00-11]
    b. Should project a single and emphatic impression. (SA-11)
    c. Can show the direct relationship of various types of merchandise.
    d. A single theme is most effective. [CTIB 082-00-12]

PLANNING NOTES

2. The merchandise
   a. Should be in demand. (SA-12)
   b. Should impress customers.
   c. Should relate to the theme.
   d. Can be displayed by several groupings.
      (1) A single type of merchandise can be shown. (PR-1; pp. 180-186)
      (2) A line of merchandise can be shown in a range of prices.
      (3) A group of related merchandise can be shown in one display.
      (4) Seasonal merchandise or merchandise for a special event can be shown.
3. The plan
   a. The display must be considered as a whole when selecting the theme, merchandise and props.
   b. A series of sketches of the planned display should depict the background, foreground, and bird's-eye view. (SA-2)
4. The construction
   a. The old display must be removed and the area cleaned in preparation for the new display.
   b. The merchandise should be collected and prepared for display.
   c. Materials and props must then be collected or built.
   d. In constructing the display, the background is developed first and then props are installed.
   e. The merchandise can be arranged in a number of patterns, including: pyramid, step, zigzag, radial, and repetitious arrangements. (PR-1; pp. 188-190) (SA-13)
   f. Once merchandise is appropriately arranged, the show card should be placed [CTIB 084--0-11]
   g. The display should be properly maintained and all merchandise sold from it should be replaced immediately. (SA-6)(SA-10)
5. The effectiveness
   a. Sales results from the display should be evaluated in terms of cost effectiveness. (SA-2)
   b. Other influences to be considered in evaluating a display include current economic conditions, the support of the sales staff, and the competition.

# STUDENT ACTIVITIES

## SALES PROMOTION FOR FASHION MERCHANDISING

Divide the class into groups of four. Have each group choose a mall or shopping center with which they are familiar. Have them list those stores which present a mass image and those stores which present a fashion image. SA 1

See page 14. SA-2

Have the students examine the outfits they are wearing and decide which forms are represented in the fabrics. A teacher may have samples to bring to class to support the discussion of form (i.e. fabric samples), SA-3

Have students bring several fabric swatches to class. The classs should identify the feeling projected by each (i.e. masculine, feminine, formal, and informal). SA-4

See page 17. Using the color wheel, have students color and label the warm colors and cool colors. SA-5

See page 18. Have students color each illustration with crayons or color pencils to achieve the effect listed below each illustration. SA-6

See page 19. SA-7

See page 20. SA-8

See page 21. SA-9

See page 22. SA-10

See page 23. SA-11

See page 24. Instructions to teacher: Assign students to groups of three. Have each student assume a role as either the junior buyer, the display manager, or the merchandise manager. SA-12

Obtain copies of mail order catalogues, magazines, and newspaper advertisements from the teacher. From these resources, cut out illustrations of merchandise that you can paste-up to illustrate the following basic display arrangements: (1) pyramid arrangements, (2) radiation arrangements, (3) repetition arrangement, (4) step arrangement, (5) zig-zag arrangement. SA-13

# MINIATURE DISPLAY

INSTRUCTIONS TO TEACHER: This project should be used as a culminating activity for this unit. Students should be told what is expected of them early in the unit. However, their actual work on the project should be completed in phases as pertinent content is discussed in class. A rating sheet is provided for your evaluation of each student's work. You may want to use this activity as an evaluation measure to document student competence.

INSTRUCTIONS TO STUDENTS: You are to plan and construct a miniature window display using a box. You will go through all the steps a display artist would follow when constructing an actual display. Activities will be assigned at various points in this unit to assist you with your planning. The final completed window display will be due at the end of the unit on sales promotion.

Step 1. Use available resources in the classroom to look for display ideas. Look carefully at the way merchandise is presented in advertisements. Look in display reference books. Think about what merchandise you would like to display. Let your imagination go.

Step 2. Plan a theme for your display that coordinates your ideas.

Step 3. Decide on the merchandise to be displayed.

Step 4. Decide on the type of display you will construct.

Step 5. Decide on your display background.

Step 6. Decide on the props to be used.

Step 7. Draw skematics for your display.

Step 8. Plan the point-of-purchase sign.

Step 9. Actually construct your display.

## MINIATURE DISPLAY

## RATING SHEET

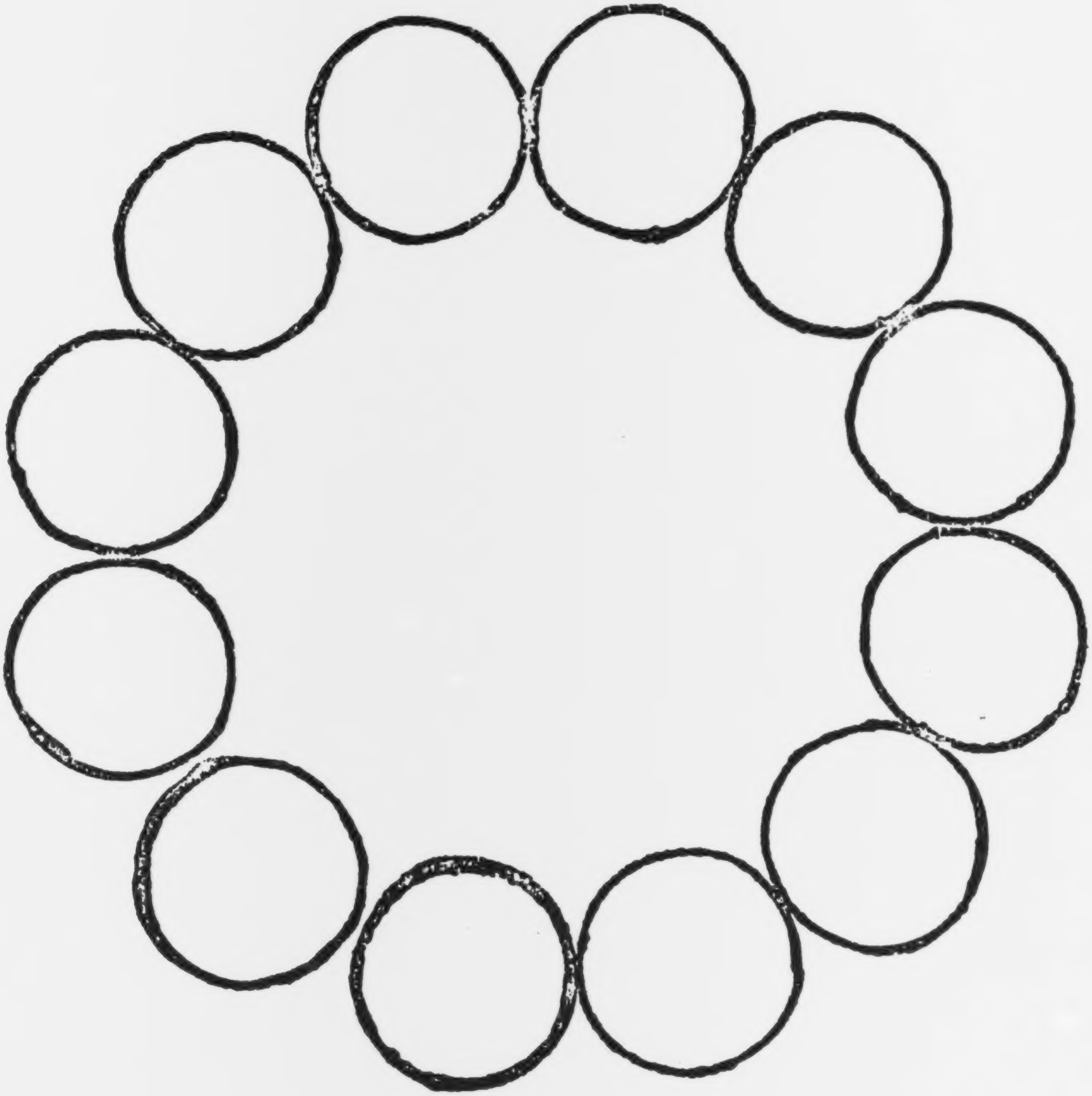
INSTRUCTIONS: Encircle the points earned on each factor that is being evaluated. Total the score for the entire project (total possible points is 100). Each student should reach a proficiency level of 70.

| FACTORS TO BE EVALUATED | Excellent | Good | Average | Poor |
|---|---|---|---|---|
| I. Display Idea/Theme | | | | |
| a. The display idea indicates creativity and research on the part of the student. | 6 | 4 | 3 | 1 |
| b. The display theme is obvious and provides unity for the display. | 8 | 6 | 4 | 2 |
| c. The display theme compliments the merchandise that is featured. | 8 | 6 | 4 | 2 |
| II. Technical Excellence | | | | |
| a. The arrangement adds to the overall appearance of the display. | 6 | 4 | 3 | 1 |
| b. The merchandise is well placed and creates a pleasing eye flow. | 6 | 4 | 3 | 1 |
| c. Design principles (balance, proportion, etc.) are effectively applied. | 6 | 4 | 3 | 1 |
| d. Color and line principles are effectively applied. | 6 | 4 | 3 | 1 |
| III. Arrangement | | | | |
| a. Display props enhance rather than detract from the merchandise featured. | 6 | 4 | 3 | 1 |
| b. Related items enhance overall appearance. | 4 | 3 | 2 | 1 |
| c. Amount of merchandise displayed is appropriate for the area allocated. | 4 | 3 | 2 | 1 |

| | Excellent | Good | Average | Poor |
|---|---|---|---|---|
| III. Arrangement (Continued) | | | | |
| d. The display has a focal point which attracts interest. | 6 | 4 | 3 | 1 |
| e. The background is appropriate for the overall effect of the display. | 6 | 4 | 3 | 1 |
| IV. Selling Power | | | | |
| a. Marketing features of the merchandise are clearly shown. | 8 | 6 | 4 | 2 |
| b. The most important, featured merchandise stands out. | 6 | 4 | 3 | 1 |
| c. The point-of-purchase sign conveys a message designed to sell. | 6 | 4 | 3 | 1 |
| V. Neatness | | | | |
| a. The overall appearance of the display is neat. | 4 | 3 | 2 | 1 |
| b. The total display is pleasing to the eye. | 4 | 3 | 2 | 1 |

TOTAL SCORE ________

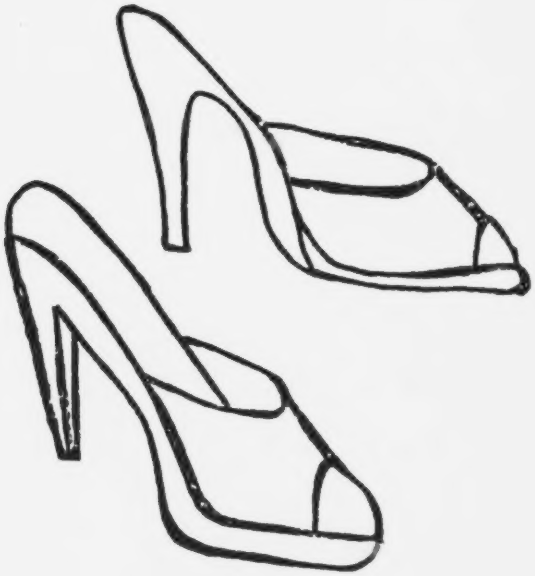
SA-5



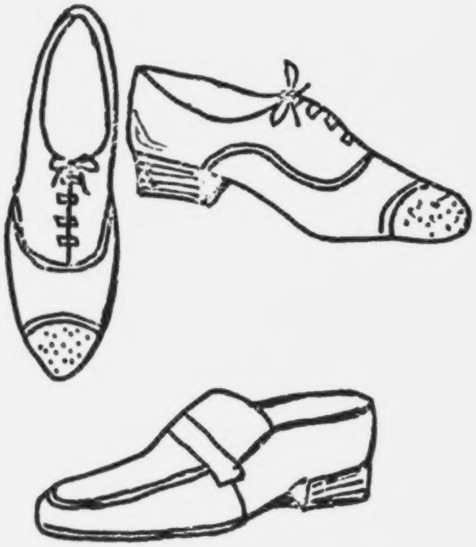
# COLOR WHEEL

SA-6

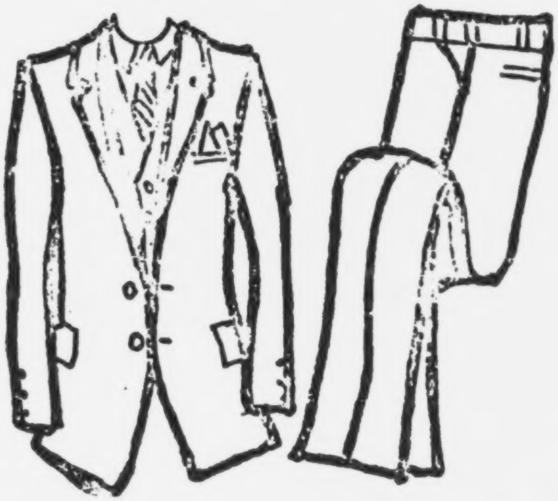
INSTRUCTIONS TO STUDENTS: With crayons or colored pencils achieve the effect named below each picture.



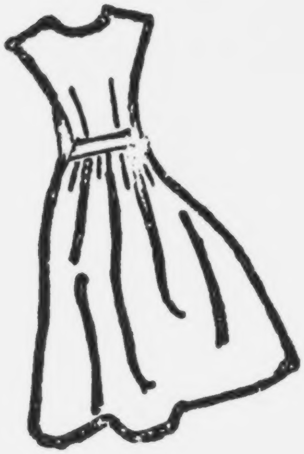
1. Show strong contrast



2. Make appear far away and small



3. Make appear formal



4. Make appear up close and larger

Select one season and one in-store promotion event listed below. Then select a type of mannequin and using up-to-date fashion magazines, write a list of merchandise and accessories that you would select for dressing the mannequin.

Types of mannequins: Adult male, adult female, teenage male, teenage female, child male, child female

Seasons: Winter, Spring, Summer, Fall

In-Store Promotions: Back to school, Coming of Spring, Sports Fans, Summer Clearance, Wedding, Sports Events, Introducing New Fashions, Rainwear.

Type of Mannequin to be Used: ________________________________

Season Featured: ________________________________

In-Store Promotion: ________________________________

| Clothing to be Used | Accessories to be Used |
|---|---|
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |

## USE OF DISPLAY FIXTURES

I. Read the three statements below. From the column at the left, select the term that best matches the statement.

A. Functional Prop
B. Decorative Prop
C. Structural Prop

_____ 1. The major prop, such as platforms, columns, and steps that support other props and merchandise.

_____ 2. Props such as easels, legs, hands, and mannequin forms used to support merchandise.

_____ 3. Props such as flowers, trees, and animals.

II. Look at the "Item" column. For each item, check either Column (A), Column (B), or Column (C) based upon the type of prop.

| ITEM | STRUCTURAL (A) | FUNCTIONAL (B) | DECORATIVE (C) |
|---|---|---|---|
| 1. Stuffed Cat | | | |
| 2. Sunglasses | | | |
| 3. Books | | | |
| 4. Floor Carpet | | | |
| 5. Step background | | | |
| 6. Palm tree | | | |
| 7. Torso | | | |
| 8. Roses | | | |
| 9. Peg Board | | | |

KEY:

I. 1. C, Structural Prop
2. A, Functional Prop
3. B, Decorative Prop

II. 1. Column C
2. Column C
3. Column B and C
4. Column A and C
5. Column A
6. Column C
7. Column B
8. Column C
9. Column A

Select three newspaper advertisements. Following the previous suggestions for developing good copy, prepare the show card copy you would use in an interior display for each of the advertisements you have selected. Write that copy in the spaces provided.

Interior Display--Show Card Copy #1

Interior Display--Show Card Copy #2

Interior Display--Show Card Copy #3

INSTRUCTIONS TO STUDENTS: Read the situation and assume the role of the display manager in making the necessary decisions.

You are planning a Valentines' fashion display for the Ladies Designer Department.

1. Select the merchandise to be featured.

2. Choose one of the fixtures available for interior displays.

3. Select functional, decorative, and structural props.

   Functional -

   Decorative -

   Structural -

4. Decide on a display background that is appropriate for the Valentine promotion.

5. Describe the location of your display within the Ladies Designer Department.

6. Design a point-of-sale sign for your display.

# DEVELOPING DISPLAY IDEAS

Effective displays usually result when the display person has a clear idea of what the finished display should look like. There are many sources for creative display ideas which can save time and effort and produce displays that will sell merchandise. Some excellent sources for ideas include the merchandise itself, publications, other displays, customers, special events, and personal display files. Very often the experienced display designer will combine several ideas from these sources to construct a single display.

This display project provides opportunities to become acquainted with the various sources of display and to practice developing creative display ideas.

## MERCHANDISE

For each item of merchandise below, list some customer uses and briefly describe a creative idea you would use to display that merchandise.

| ITEM | CUSTOMER USES | CREATIVE DISPLAY IDEA |
|---|---|---|
| MEN'S TIES | | |
| CHILDREN'S PAJAMAS | | |
| DESIGNER JEANS | | |
| RAINCOATS | | |
| TENNIS SHOES | | |

## CASE STUDY

Logan's Department Store is planning to hold a special back-to-school promotion during the second week of August. Today is June 2. Realizing that merchandise and display supplies must be ordered for the event, Mr. Mayberry, the store manager, sends out memos to his junior buyer, his merchandise manager, and the display manager.

### MEMORANDUM

TO: Junior Buyer
Merchandise Manager
Display Manager

FROM: R. K. Mayberry, Store Manager

DATE: June 2, 19--

Please plan to meet in my office at 1:00 p.m. on June 5 to discuss our back-to-school special promotion. In preparing for this meeting, the three of you should jointly develop a proposed plan for this promotion. Your plan should include the following information:

(1) Merchandise needed for the promotion,
(2) Display supplies that will be needed for the promotion,
(3) A general theme for the promotion.

We will make final decisions regarding your plan during our meeting.

Unit **VI** - Sales Promotion

| | |
|---|---|
| HO-1 | Examples of Effective Use of Proportion in a Display |
| HO-2 | Suggested Procedures For Preparing Mannequins for Display - Display LAP 13, #193, H.O.2. |
| HO-3 | Things to Consider When Planning Display Background - Display LAP 14, #182-B, H.O.1. |
| HO-4 | Prime Locations for Special Displays - Display LAP 19, #200-A, H.O.3. |
| HO-5 | Guidelines for a Good Display Sign |
| HO-6 | Procedures Necessary For the Proper Upkeep of Department Displays of Merchandise - Display LAP 8, #177-A, HO-1. |

| | |
|---|---|
| TM-1 | Broad Purposes |
| TM-2 | Special Events |
| TM-3 | Mass Display |
| TM-4 | Mass Multiple or Related Products |
| TM-5 | Art Elements |
| TM-6 | Design Principles |
| TM-7 | Repetition, Alternation, Progression |
| TM-8 | Emphasis |
| TM-9 | Locating Signs in Displays - Display LAP 30, #225-A, T.M.#1 |
| TM-10 | Locating Signs in Displays, Display LAP 30, #225-A, T.M.#2 |
| TM-11 | Lead-in-line, Headline, Body Copy, Price |

# EXAMPLES OF EFFECTIVE USE OF PROPORTION IN A DISPLAY

1. If a feminine look is desired:

   Use about 2/3 curved lines and 1/3 straight lines
   Use about 2/3 soft textures and 1/3 hard textures

2. If a masculine look is desired in a display:

   Use 2/3 straight lines and 1/3 curved lines
   Use 2/3 hard textures and 1/3 soft textures

3. If a formal look is desired:

   Use about 2/3 vertical lines and 1/3 horizontal lines
   Use about 2/3 smooth textures and 1/3 rough textures
   Use about 2/3 subtle, cool colors and 1/3 warm colors

4. If an informal look is desired:

   Use about 2/3 horizontal lines and 1/3 vertical lines
   Use about 2/3 smooth textures and 1/3 rough textures
   Use about 2/3 warm, bright colors and 1/3 cool colors

5. When using a mannequin or another tall object in a display, another object should be about 2/3 the height of the tall object, and other objects should be about 2/3 the height of the second object. The eye will flow easily from the top of the display and will move to the floor by resting on the various sizes of the objects. This is much more pleasing than an abrupt fall straight from the tallest object to flat objects on the floor of a display.

6. Props should be only about 1/3 of the items found in the display with merchandise making up the other 2/3. The purpose of props is to enhance the merchandise, not to overpower it.

# GUIDELINES FOR A GOOD DISPLAY SIGN

1. Signs must serve as a silent salesperson.
2. Signs should tell what the product is, its benefits, and its cost.
3. Signs must be simple, factual, and informative.
4. Sign should tell about the product from the customers' viewpoint.
5. Sign lettering should stand out (black or red on white signboard) and large enough to be easily read.
6. Sign should be legible.
7. Sign should be in good condition as it keeps display information fresh and attractive.

# BROAD PURPOSES

1. Sell a product
2. Build allegiance
3. Arouse interest
4. Provide information
5. Promote store image

# SPECIAL EVENTS

## CLINIQUE MAKEOVERS

Cosmetics department Tuesday

Yves St Laurent
3 piece suit GIVE AWAY Register Now Mens Shop

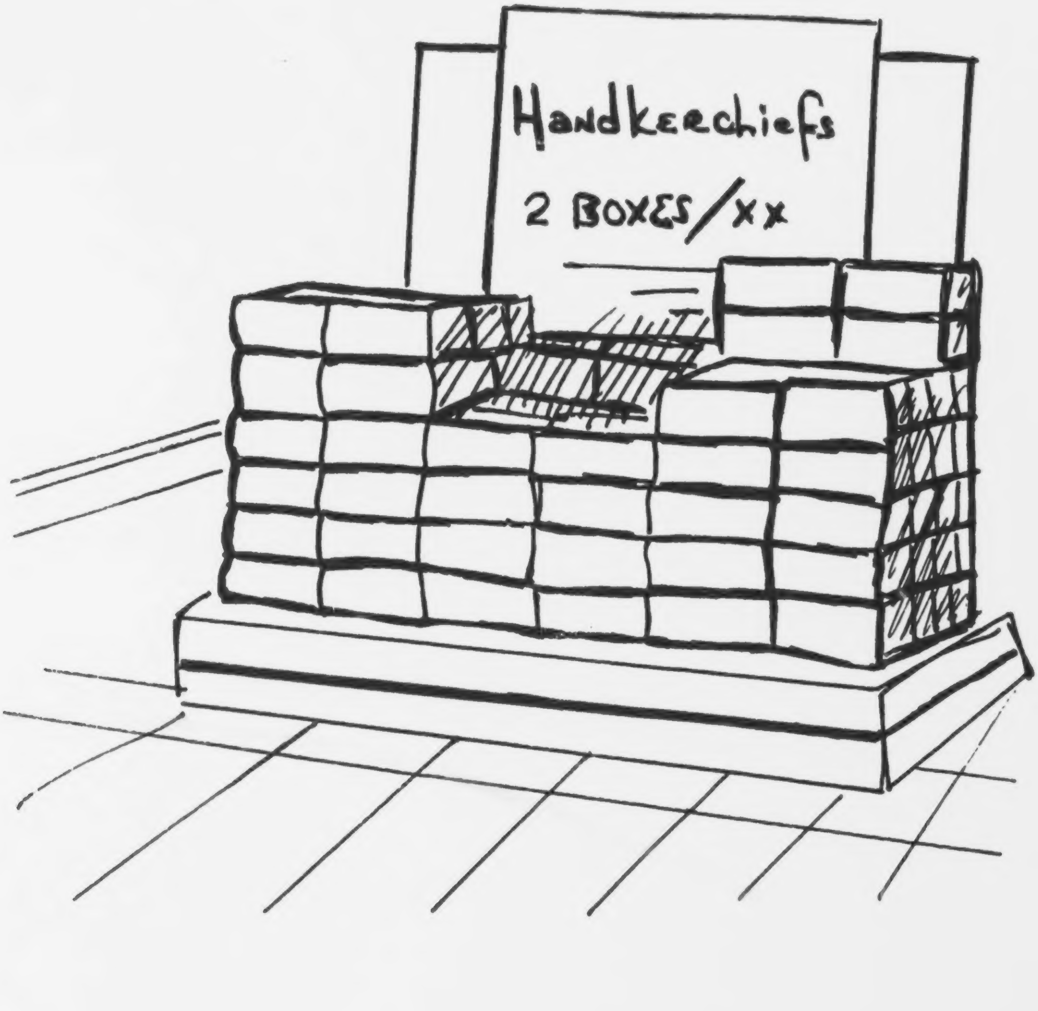
## TEXAS Spirit fashion show

teen shop
Saturday
1:00

## PUPPET SHOW

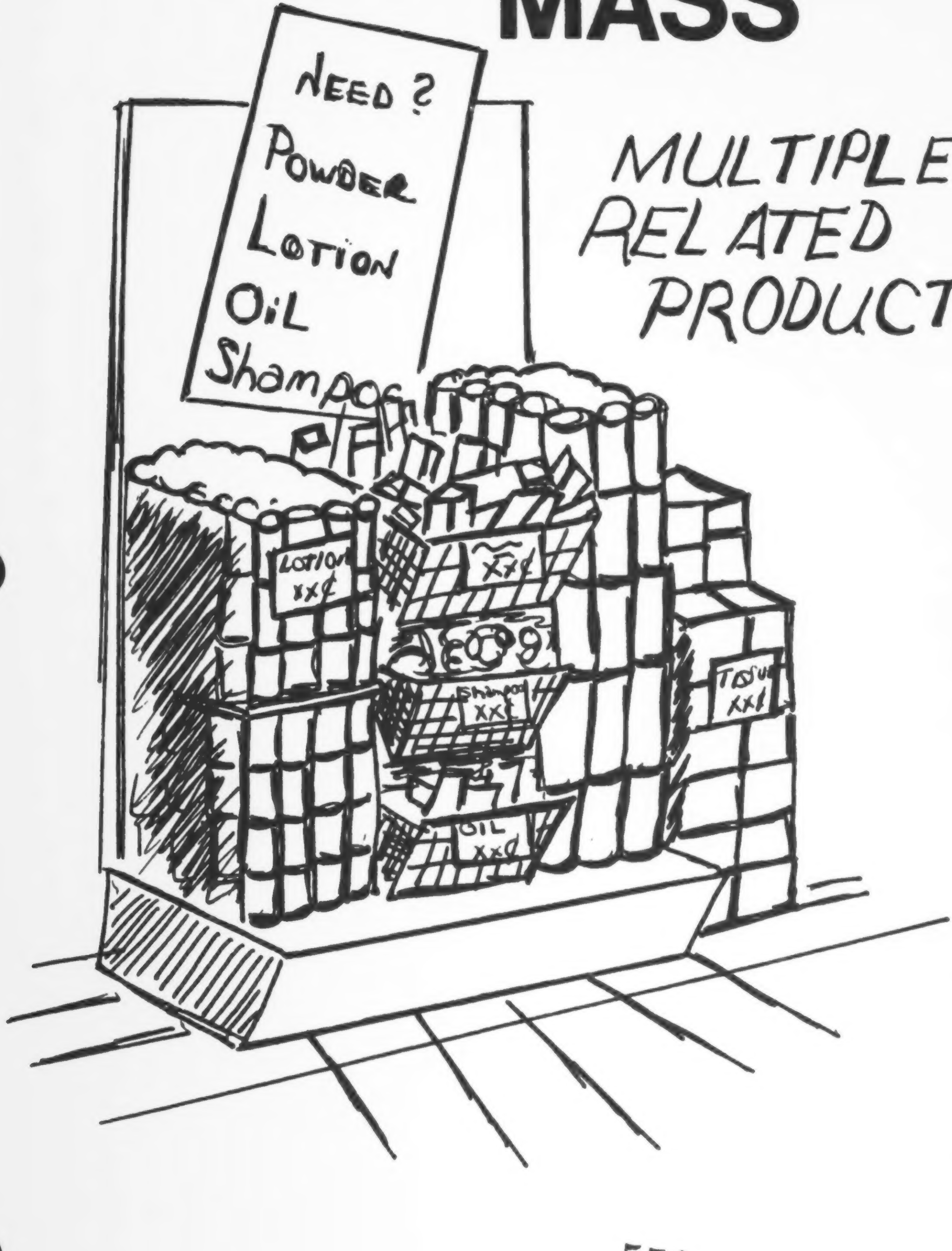
children's department
Saturday 10:00, 11:00, 12:00

# MASS DISPLAY


Handkerchiefs
2 BOXES/XX

# MASS

MULTIPLE OR RELATED PRODUCTS


NEED ?
POWDER
LOTION
OiL
Shampoo
LOTION XX¢
XX¢
Shampoo XX¢
OIL XX¢
TISSUE XX¢

# ART ELEMENTS

Space

Form

Line

Texture

Color

# DESIGN PRINCIPLES

Form follows Function

Variety in Unity

Balance

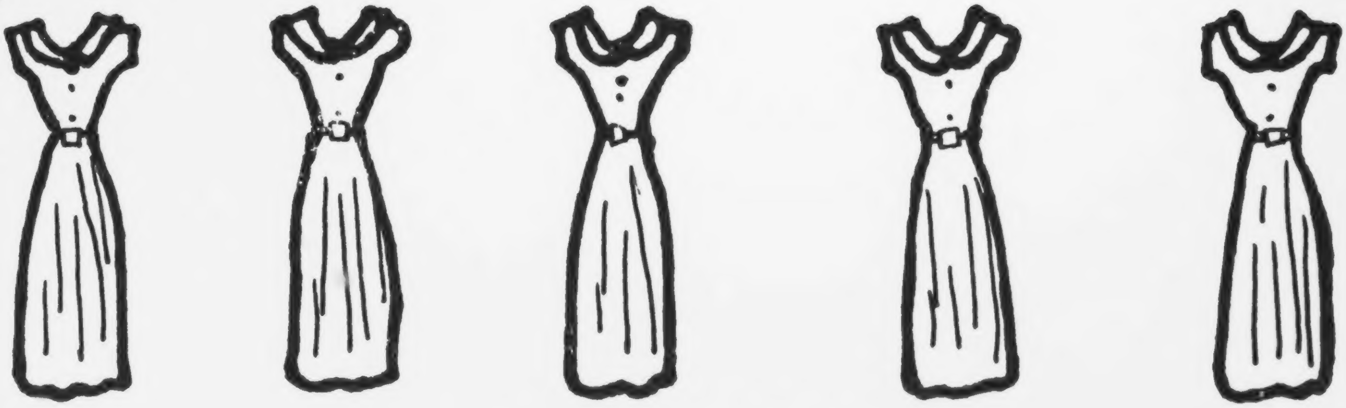
Rhythm

Emphasis

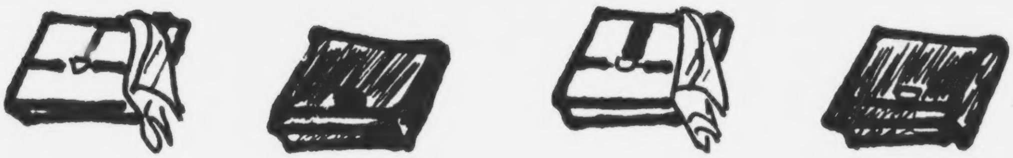
Proportion

Scale

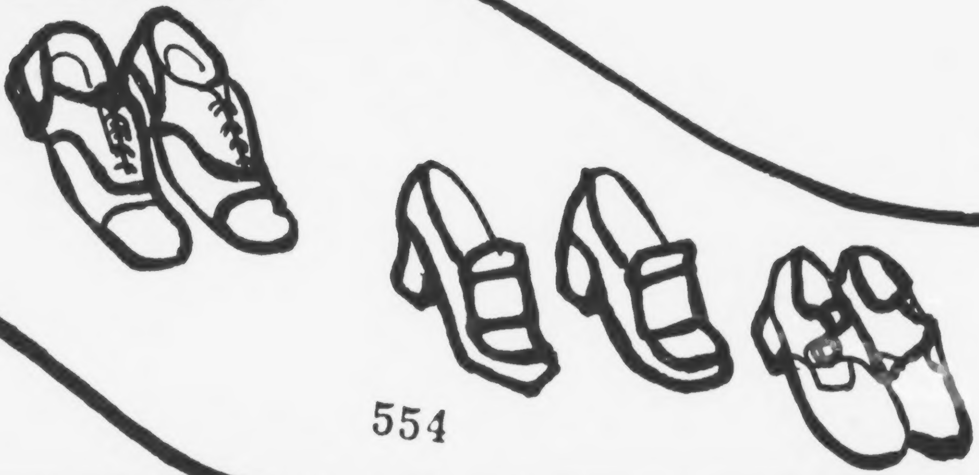
# Repetition

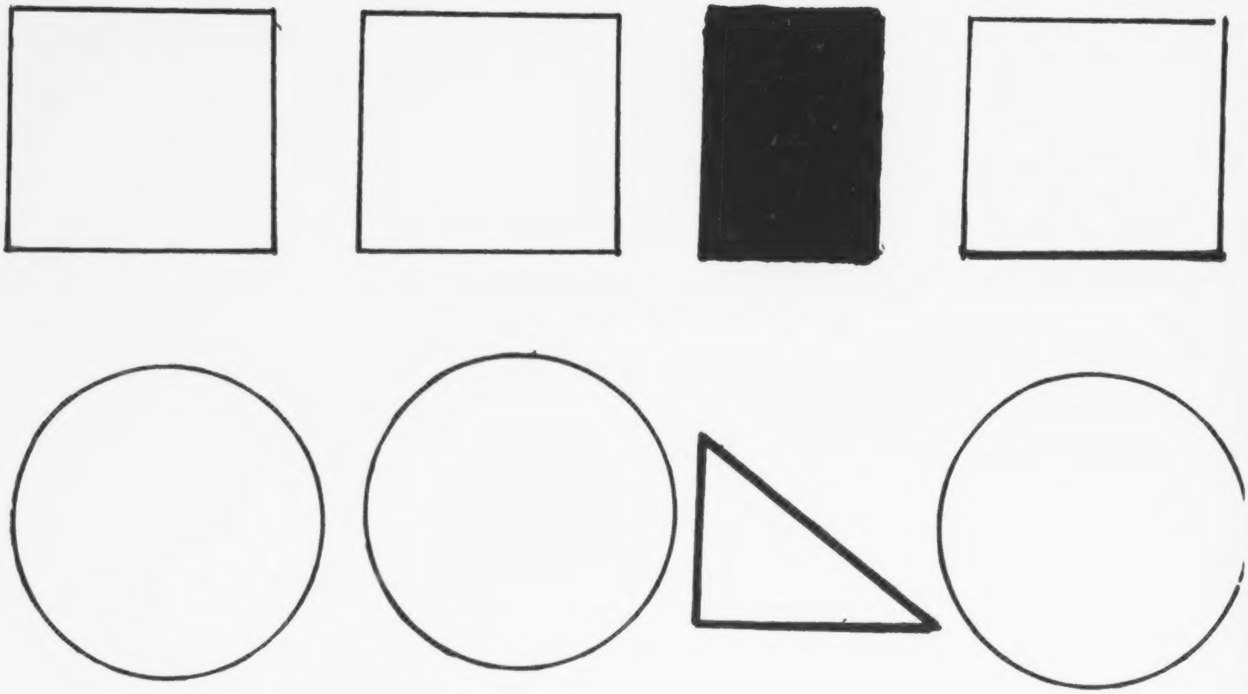


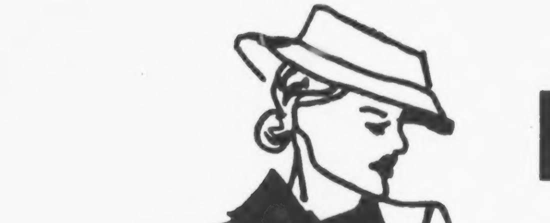
# Alternation



# Progression







# Emphasis

Sales Promotion
24.19

TM-11

LEAD-IN-LINE — Romance at your fingertips

HEADLINE — L'Oreal

BODY COPY
- 75 sensuous shades
- strengtheners to prevent splitting
- specially formulated base

PRICE — $3.00 for 5 fluid ounces

# EVALUATION MEASURES AND KEYS
# (COMPETENCY / TEST - ITEM BANK)

# TABLE OF SPECIFICATIONS FOR TEST CONSTRUCTION

PROGRAM AREA Marketing and Distributive Education

COURSE NAME Fashion Merchandising

UNIT **Sales Promotion**

| Competency | EXPECTED STUDENT OUTCOME | | | | % Importance | Total No. of Items |
|---|---|---|---|---|---|---|
| | Cognitive Level* I | II | III | Performance | | |
| 074. Identify the uses and purposes of sales promotion. | X | | | | | |
| 075. Develop display ideas congruent with the purposes or uses identified. | | | X | X | | |
| 076. Identify the basic art elements of display and the principles of design. | X | | | X | | |
| 077. Highlight advertised items on shelves and displays. | X | | | | | |
| 078. Select appropriate display fixtures, props, and backgrounds. | X | | | X | | |
| 079. Plan location of displays considering logical groupings, maximum customer exposure, present and anticipated sales volume, in keeping with the store layout. | | | | X | | |
| 080. Develop point-of-purchase signs (show cards) and banners. | | | | X | | |
| 081. Obtain information and materials for displays. | | | X | | | |
| 082. Select merchandise for display that is seasonal and timely. | | X | | X | | |
| 083. Coordinate displays with other promotional activities. | | | X | | | |
| 084. Display merchandise appropriately. | | | | X | | |
| 085. Build displays. | | | | X | | |
| 086. Prepare merchandise for display including pressing, repairing, etc. | | | | X | | |
| 087. Maintain sales appearance of displays by rearranging when necessary or replacing merchandise sold from displays. | | | | X | | |
| 088. Use housekeeping procedures necessary for the proper upkeep of department displays of merchandise. | | | | X | | |
| 089. Evaluate the effectiveness of display by analyzing sales results with regards to the purpose of the display. | | | X | X | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

*LEVEL I - Recall, II - Comprehension, III - Application

**COMPETENCY 074**: Identify the uses and purposes of promotion.

TEST ITEM 074-00-11

INSTRUCTIONS TO STUDENTS: List the five (5) broad purposes of sales promotion.

1.
2.
3.
4.
5.

TEST ITEM 074-00-12:

INSTRUCTIONS TO STUDENTS: In Column I, various sales promotion activities are listed. Specific purposes of sales promotion are listed in Column II. Match the specific purpose to each of the activities. In some cases, more than one specific purpose is addressed. Record the letter(s) of your choice in the space provided to the left.

| Column I | Column II |
|---|---|
| ____ 1. Accessories matched with apparel in a window display. | A. Attract new groups of customers |
| ____ 2. Commercial during cartoons | B. Coordinate related products |
| ____ 3. Demonstration on how to use a product | C. Establish store as a fashion authority |
| ____ 4. Fashion show for petite sizes | D. Give useful information on use of product |
| ____ 5. Ad featuring Aigner handbags, shoes and accessories | E. Identify brands |
| ____ 6. A large annual fashion show | F. Indicate product assortments |
| ____ 7. Ad featuring a 20% off sale | G. Introduce new product |
| ____ 8. Free samples given away to customers to introduce a product | H. Present special offers, prices and sale conditions |
| ____ 9. A drawing for free concert tickets | I. Reach persons who influence the purchaser |
| ____10. Ad showing various styles and prices of men's shoes | J. Render community service |

TEST ITEM 074-00-13

INSTRUCTIONS TO STUDENTS: Define the terms nonpersonal promotion and personal promotion. Provide an example of each term.

1. Nonpersonal promotion:

   Example:

2. Personal promotion:

   Example:

**COMPETENCY 075: Develop display ideas congruent with the purposes or uses identified.**

TEST ITEM 075-00-11

INSTRUCTIONS TO STUDENTS: Read each of the following statements about display objectives. Write the correct response (true or false) in the blank to the left of each statement.

_____ 1. A display can only be used to sell a product, service, or idea.

_____ 2. Institutional displays are usually of a noncommercial nature.

_____ 3. A promotional display features current merchandise.

_____ 4. The purpose of an institutional display is to produce immediate sales for the store.

_____ 5. A feeling of goodwill toward the store is usually accomplished by an institutional display.

TEST ITEM 075-00-12

INSTRUCTIONS TO STUDENTS: Read each of the following statements about mass and fashion displays. Write the correct response (true or false) in the blank to the left of each statement.

_____ 1. Emphasis is on budget prices in a mass display.

_____ 2. In a mass display there is a lot of space allowed between items.

_____ 3. A fashion display attempts to have a prestigious look.

_____ 4. Higher priced items are highlighted best in a fashion display.

_____ 5. Store image is unrelated to displays in the store.

561

COMPETENCY 079: Plan location of displays considering logical groupings, maximum customer exposure, present and anticipated sales volume, in keeping with the firm layout.

TEST ITEM 079-00-11

INSTRUCTIONS TO STUDENTS: Read carefully the following statements about floor plans. Write the correct response (true or false) in the blank to the left of each statement.

_____ 1. Windows-on-the-aisle are located at the back of the department.

_____ 2. The newest, most exciting merchandise is located in the bread and butter section of the department.

_____ 3. The vistas are located at the back of the department and should entice the customer into the department.

_____ 4. The windows-on-the-aisle should include limited coordinated outfits that "face out" to the aisle.

_____ 5. In high traffic areas the merchandise must be changed frequently.

COMPETENCY 080: Develop point-of-purchase signs and banners.

TEST ITEM 080-00-11

INSTRUCTIONS TO STUDENTS: Read the fact sheet sent to the advertising department and then design a point-of-purchase sign for a display.

MERCHANDISE FACT SHEET

Item: Briefcase
Price: $85.00
Material: Leather
Vendor: Mr. Leather
Style: zipper opening with handles
        interior pockets
        brass fittings on corners to cut down on wear
Colors: Brown, Black, Cordivan
Features: interior pockets, lightweight, slim styling
Submitted by: John Mayberry, buyer

COMPETENCY 082: Select merchandise for display that is seasonal and timely.

TEST ITEM 082-00-11

INSTRUCTIONS TO STUDENTS: List six sources for display themes.

1.
2.
3.
4.
5.
6.

TEST ITEM 082-00-12

INSTRUCTIONS TO STUDENTS: Select one of the following display themes. List appropriate merchandise and structural, decorative and/or functional props to be used in this seasonal display.

Themes: "Christmas is Near"
"Stay Cool"
"Count Down to Fall"
"Warm and Wooly"
"Sun and Surf"

Theme: ____________________

Props to be used: Structural: ____________________

Decorative: ____________________

Functional: ____________________

Merchandise to be featured:

Apparel: ____________________

Accessories: ____________________

**COMPETENCY 084: Display merchandise appropriately.**

TEST ITEM 084-00-11

INSTRUCTIONS TO STUDENTS: In Column I are types of display arrangements. From the characteristics of arrangements in Column II select the one which is most appropriate for each arrangement. Record the letter of your response in the space provided to the left.

Column I

_____ 1. Pyramid arrangement

_____ 2. Radial arrangement

_____ 3. Repetition arrangement

_____ 4. Step arrangement

_____ 5. Zigzag arrangement

Column II

a. Arrangement that has no planning or structure.

b. When items of the same shape and size are placed equidistant apart in a direct line.

c. Arrangement used only with men's wear.

d. When no two heights throughout the display are the same.

e. Arrangement forms a perfect triangle.

f. Eye is lead from low point to the high point in the center or to the opposite side by progressive steps.

g. Arrangement may be full circle, semi-circular or oval in shape.

## TEST ITEM KEYS

074-00-11

1. Sell a product, service, or idea at a profit.
2. Build customer allegiance to the store.
3. **Arouse customer interest for the product, service, or idea.**
4. Provide information to prospective customers.
5. Promote the image of the store.

074-00-12

1. **B**
2. **I**
3. **D,G**
4. A,C
5. E,F
6. **C,B,G**
7. H
8. G
9. J
10. F

074-00-13

1. Nonpersonal promotion--communication sponsored by a store that reaches many prospective customers by various media, mailings or special events.
   Example: publicity, advertising, visual merchandising, special events
2. Personal promotion--face to face communication between the store's representative and a customer
   Example: personal selling by a salesperson

075-00-11

1. False
2. True
3. True
4. False
5. True

075-00-12

1. True
2. False
3. True
4. True
5. False

079-00-11

1. False
2. False
3. True
4. True
5. True

080-00-11

Teacher discretion. Should include the following points: Executive styling from Mr. Leather;
deluxe fitted insides,
100% leather
smooth surface
$85.00

082-00-11

1. Merchandise
2. Special Events or Promotions
3. Dealer aids
4. Customers
5. Fashion Periodicals
6. Own creativity

082-00-12

Teacher Discretion.

084-00-11

1. e
2. g
3. b
4. f
5. d

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# PRINTED REFERENCES

## PRINTED REFERENCES FOR SALES PROMOTION

TEXT:

Dolmian, Judi L., and Kent Duniphan. Color in Display. Missouri: Milliken Publishing Company, 1980. PR-1

Tolman, Ruth. Fashion Marketing and Merchandising. New York: Milady Publishing Company, Inc., 1974. PR-2

OTHER:

TEXT:

Carty, Richard. Visual Merchandising Principles and Practices. New York: MPC Educational Publishers, 1978.

Joel, Shirley. Fairchild's Book of Window Display. New York: Fairchild Publications, Inc., 1973.

Winters, Arthur A. and Stanley Goodman. Fashion Advertising and Promotion. New York: Fairchild Publications, Inc., 1978.

CONSORTIUM AND CURRICULUM LAB MATERIALS:

Hatchett, Melvin. Merchandise Display. Texas: Instructional Material Services; Division of Extension, The University of Texas at Austin, 1972.

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# EMPLOYMENT SKILLS

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Marketing and Distributive Education

Fashion Merchandising - 7271
Fashion Merchandising and Management - 7272

| COMPETENCY STATEMENT | 7271 | C | S | CO |
|---|---|---|---|---|
| I. Fashion Image | | | | |
| A. Physical Appearance | | | | |
| 090 Maintain appearance and health.<br>The student will identify characteristics and factors which contribute to appearance and health. | X | | | X |
| B. Self-Development | | | | |
| 091 Demonstrate appropriate social skills in terms of self-development.<br>The student will identify appropriate behavior for self-development. | X | | | X |
| II. Pre-Employment Skills | | | | |
| A. Job Seeking | | | | |
| B. Letter of Applications, Resume, Applications | | | | |
| C. Job Interview | | | | |
| D. Follow-Up | | | | |
| I. Professional Ethics | | | | |
| A. Characteristics of a Good Employee | | | | |
| 092 Be dependable in the work environment.<br>The student will determine characteristics of a dependable employee. | X | | | X |
| 093 Maintain necessary endurance, forebearance, and persistence to accomplish goals and objectives.<br>The student will select behavior characteristics necessary for accomplishing goals and objectives. | X | | | X |
| 094 Demonstrate effective work habits by planning and scheduling work tasks and assignments.<br>The student will identify behavior necessary for effective work habits. | X | | X | |
| 095 Demonstrate good work habits such as punctuality, orderliness, and patience.<br>The student will identify factors which contribute to punctuality, orderliness, and patience. | X | X | | |
| 096 Adjust to demands of job requirements such as deadlines, pressures, and conflicts.<br>The student will identify factors which are necessary for meeting job demands. | X | X | | |
| 097 Exercise self-control during trying situations.<br>The student will exhibit self-control in handling a customer complaint. | X | | | X |
| 098 Maintain an objective point of view in problem situations.<br>The student will identify factors which indicate an objective viewpoint. | X | | X | |
| 099 Demonstrate appropriate ethics such as integrity and honesty.<br>The student will identify situations where appropriate ethics such as honesty and integrity are demonstrated. | X | | | X |

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| COMPETENCY STATEMENT | 7271 | C | S | CO |
|---|---|---|---|---|
| 100 Establish and maintain credibility with customers, co-workers, employees, and managers.<br>The student will maintain credibility with others in dealing with a customer complaint. | X | | | X |
| 101 Utilize appropriate assertiveness when working with other employees, managers, and customers.<br>The student will use assertiveness in handling a customer complaint. | X | | | X |
| 102 Demonstrate initiative in dealing with customers, other employees, and supervisors.<br>The student will demonstrate initiative in handling a customer complaint. | X | | | X |
| 103 Assume responsibility for individual actions and/or department and company operations.<br>The student will identify situations where responsibility for individual actions is exhibited. | X | | | X |
| 104 Assume a shared responsibility for success or failure of the work group.<br>The student will identify situations where responsibility for shared success or failure is exhibited. | X | | | X |
| 105 Demonstrate knowledge of how success or failure depends not alone on technical proficiency but on quality of interpersonal relations as well.<br>The student will identify situations where the importance of interpersonal relations is indicated. | X | | | X |
| 106 Use success or failure constructively in a work situation.<br>The student will identify behavior which contributes to constructive use of success or failure in the work situation. | X | X | | |
| 107 Work cooperatively with other employees, supervisors, and managers.<br>The student will identify behaviors which exhibit cooperative working relationships.<br>The student will identify the benefits of a positive attitude and the disadvantages of a negative attitude. | X | X | | |
| 108 Demonstrate knowledge that the needs, desires, and goals of individuals vary with social and cultural backgrounds.<br>The student will identify situations related to social and cultural backgrounds and the needs, desires, and goals of individuals. | X | | | X |
| B. Customer-Related Relations | | | | |
| 109 Avoid misrepresentations of products, services, people, and policies.<br>The student will identify situations where products, services, people, and policies are misrepresented.<br>The student will identify sources of reliable information.<br>The student will avoid misrepresentation of products, services, people, and policies. | X | | X | |
| 110 Respond to customer complaints in accordance with company policy.<br>The student will respond in a satisfactory manner to customer complaints.<br>The student will identify situations related to company policy.<br>The student will respond to a customer complaint according to company policy. | X | X | | |

| COMPETENCY STATEMENT | 7271 | C | S | CO |
|---|---|---|---|---|
| C. Employer-Employee Relations | | | | |
| 111 Demonstrate knowledge of how to suggest changes to management.<br>The student will identify leadership styles and how to suggest changes.<br>The student will identify how to make suggestions to personnel management correctly. | X | | X | |
| 112 Accept constructive criticism and take appropriate corrective actions.<br>The student will identify correct behavior in accepting constructive criticism and corrective actions. | X | | | X |

I. Fashion Image (SA-1) PLANNING NOTES

A. Physical Appearance (PR-16)

1. Importance of appearance and health

a. Influences way others think about you.

(1) Our judgments are based on appearance and first impressions; and we rarely change our opinions.
(2) Package yourself in such a way that others will receive a positive first impression.

b. Influences way others react to what you say and do.

Changes in your personal packaging, such as speech, voice, mannerisms, and dress affect how others react to you.

c. Gives you confidence.

You will be more positive in your attitude if you know you look good and are in good physical condition.

d. Creates impression on customers and business associates as it creates a positive or negative public image. (SA-2; PR-17)

Changes in makeup, hair styling and a few basic clothing choices can project a "management look."

e. Develops stereotypes.

(1) Ex., people who wear a beige raincoat are thought to be members of the upper-middle class; people who wear black raincoats are thought to be members of the lower-middle class (Dress for Success, Malloy).
(2) We tend to think of one mode of dress for a particular occupation.

f. Adds credibility to your business and personal life. (HO-1)

(1) Ex., attractive people are thought to be kinder, more interesting, poised, modest, stronger, sociable, outgoing and sexier than the unattractive, and are expected to get prestigious jobs, make good husbands or wives and have happy marriages.
(2) How a person dresses and feels influences almost anyone's judgment, either consciously or unconsciously.

2. Take care of your health.

a. Sleep eight or ten hours a night.

(1) Some people require more sleep than others.
(2) Find out what amount of sleep helps you maintain a good level of energy and work performance.

b. Take short rest breaks.

(1) Find some time for a short break during the day.
(2) Rest breaks tend to revive our minds and bodies so that better production can be attained.

c. Have an annual check up.

Keep your body tuned up and in good running order just as you have your car checked so that it continues to run at top performance.

d. Take good care of your teeth and eyes.

Have your vision checked once a year and visit your dentist twice a year unless there are unexpected problems.

e. Eat properly.

It has been said that you are what you eat--some of us are in bad shape if that is true! The following is from Seventeen's Daily Food Guide:

(1) A quart of milk or milk products.
(2) Two or more servings of meat, fish, or poultry or eggs; or meat substitutes.
(3) Two or more vegetables--one leafy yellow or green--plus one potato.
(4) Two or more fruit servings.
(5) At every meal, some product made of flour or cereal, and butter or margarine.

PLANNING NOTES

(6) Six to eight glasses of water each day--this is a must which most of us avoid.
(7) Sweets, but in moderation!

f. Exercise for health, stamina, and good appearance.

(1) **Set aside a daily half hour for an at home exercise session.**
(2) **When we look good and feel good we make a more positive impression on others.**

3. Good Grooming

(SA-3: PR-16)
(SA-4; PR-16)

A clean, attractive appearance pays dividends through acceptance and respect from friends and family and reflects consideration for others.

a. Bath or shower each day (preferably with a deodorant soap)--or twice a day if you have been active and have another important engagement.
b. Girls should keep underarms and legs clean shaven--young men should make sure facial hair is clean shaven.
c. Use an anti-perspirant deodorant daily.
d. Wear fresh, clean under and outer garments.

(1) All the deodorants and soaps in the world will do very little good if clean clothing is not placed over a clean body.
(2) You do not necessarily need an expensive wardrobe to dress neatly and attractively.

e. Scents should be fresh and pleasant to the people around you.

Due to different body chemistries, do not purchase perfumes, colognes, or shaving lotions, etc., until you have worn them on your own skin for about an hour.

f. Hair should be clean and the style flattering.

(1) Oily hair needs to be washed every day, sometimes twice a day, and dry hair needs to be washed less often.
(2) A visit to a hair stylist can help determine face shape and features that will help in your decision for a flattering hair style and one that is appropriate for the occasion.

g. Hands and feet do attract attention.

(1) Fingernails and toenails need attention at least once a week.
(2) Men need to have relatively short, rounded nails that are impeccably clean--and ladies should not have "dragon lady" fingernails or wild polish.

h. Makeup application should enhance beauty, not detract from it.

(1) Visit makeup departments and salons for free or minimal cost lessons and makeup counseling.
(2) Makeup should not be the same for every occasion.
(3) The color of hair and eyes, as well as skin tone and the color of the wardrobe all have a determining factor in selecting makeup.
(4) Avoid a line of demarcation to show where makeup leaves off--extend the makeup past the jawline and blend completely a shade of makeup that most closely resembles your natural skin tone.
(5) Practice makes perfect--never leave your looks to chance by trying new techniques and makeup just before an important engagement.
(6) Some facial "flaws" may even be camouflaged with makeup techniques and contouring.
(7) Do not "date" yourself with outdated methods of applications and colors in cosmetics--just as clothing fashions change, so do cosmetic fashions.
(8) Read and study the latest fashion magazines to keep up-to-date with the hows and whys of cosmetics.

4. Erect and relaxed posture is a must.

Learning to walk, stand, and sit in a proper fashion should become a natural part of your appearance in order to exhibit self-confidence and grace.

5. Dress to impress the right people at the right time.

a. Five mistakes made in choosing clothing for business impressions:

(HO-2)

(1) The spouse, boyfriend, or girlfriend selects the clothing.
(2) The high fashion industry designers dictate what to wear.
(3) A favorite salesperson chooses the attire.
(4) The person finds it difficult overcoming their background and environment.
(5) **Cheap cl**othes are bought.

b. **Choose your c**lothing appropriately for the occasion or the career.

**Remember, we never get a second chance to** make a **first impression!** Clothing serves as a means of communication. Clothing tends to reveal a lot about our self-concepts and image. Persons who reflect confidence and self-esteem tend to be more concerned with appearance than those persons who suffer from feelings of inadequacy.

(1) Read current fashion periodicals to keep up-to-date on fashion trends as they apply to various situations. However, be selective. Your geographical area as well as your work environment will tend to dictate what is appropriate.

(SA-5)

(2) Keep in mind your figure and physique when selecting certain fashions. Make the most out of your appearance, do not wear the latest fashion just because it is fashion if it does not enhance your appearance.
(3) Learn to recognize the difference between good and poor fashions.
(4) Decide what kind of image you wish to project.
(5) Remember that quality clothing can be reasonably priced.
(6) Shoes and stockings can make or break a good appearance.
(7) Accessories should be kept to a minimum. A watch and ring for a young man is appropriate. Young ladies should stay away from long, dangling earrings for business attire and a ring on every finger is not acceptable. All accessories (whether hats, bags, jewelry, etc.) should be kept in proportion to the person's size.
(8) Plan your wardrobe and take inventory of your closets and drawers before shopping for the season.
(9) Color, line, and design should be appropriate. Molloy's Dress for Success relates how important these factors are. Bold stripes, large patterns, bright colors have very little place in business attire. He suggests staying with tailored clothing in such colors as gray, navy, brown, tan, beige, and blue, depending on skin, hair, and eye coloring of the person.

(SA-6)
(HO-3)
[CTIB 090-00-11]
[CTIB 090-00-12]
(SA-7)

B. Self-Development

1. Your Self-image

You have a mental image of yourself--the way you see yourself. You broadcast this image to others in the form of your personality by the way you dress, talk, move, and act. If you don't like what you see, maybe it is time for a change!

a. Importance of positive self-image

(1) Has to do with how people respond to you.
(2) Usually determines what career or lifestyle you choose.
(3) Determines whether you are willing to try new things.
(4) Can determine whether you advance quickly in a career.
(5) May determine whether you get the right kind of help and understanding from others.
(6) Usually determines how you respond to the world around you.

b. Factors that determine self-image

(SA-8)

(1) Who you think you are.
(2) What and who you think you will become in the future.
(3) How you believe others see you.

2. Characteristics of Personality

(SA-9; PR-2)

a. Physical characteristics

(1) Health
(2) Grooming and dress
(3) Structure of body
(4) Posture and bodily movements
(5) Facial expression

A pleasing appearance does not require a person to have a pretty or handsome face, but it does require a smiling face.

PLANNING NOTES

(6) Mannerisms

Habits may be done unconsciously and are annoying to others. Ex., cracking knuckles, clearing the throat, tapping fingers, clicking a pen.

(7) Speech

(PR-3; pp. 132-133)

Your voice and speech contribute as much to your total image as your physical appearance, poise and personality. A strong voice and good grammar draw attention, a weak voice and poor grammar may detract from an otherwise positive opinion from others.

b. Mental characteristics

(1) Intelligence--ability to understand or learn from past experiences and acquire or retain knowledge.

(2) Attitudes--the way you look, think, or act that shows your disposition or opinion toward a subject.

(PR-14; Lap 11)

(a) Initiative--the ability to think or act without being told to do so.

(b) Industrious--mental attitude that causes a person to want to work hard.

(c) Dependability--the attitude that causes a person to follow through on obligations and responsibilities.

(d) Enthusiasm--the intense or eager display of interest in a subject.

(e) Interest in others--the attitude that causes others to become your friend.

(SA-10)

(3) Character--usually refers to a person's moral reputation.

Honesty is the most important character trait.

c. Emotional characteristics

An emotion is best described as a desire or a feeling, such as hate, fear, love, anger, worry, or pride. People who are unable to properly control their feelings are said to be emotionally immature. Strong emotional reactions are to be expected of small children, but as you grow older people expect you to learn to cope with and control your emotions within reason.

3. Evaluate Your Self-Image

a. Positive self-image

(1) Take risks

(2) Are not afraid to fail

(3) Have realistic expectations of themselves

(4) Are self-determining and confident of their own perceptions

(5) Know they have control of, and are willing to take responsibility for, change

(6) Are proud of themselves and their strengths

(7) Expect to succeed

b. Negative self-image

(1) Do not take risks

(2) Are afraid of failure

(3) Have unrealistically high expectations

(4) Make assumptions about opinions and expectations of others without reality testing

(5) Abdicate responsibility; procrastinate

(6) Focus on failure

(7) Expect to fail

4. How to Improve

(HO-4)

5. Social Graces Help With Confidence

Social graces or etiquette may be defined as the usages or rules which are conventionally established for behavior in polite society or in official or professional life. Knowing what to do, how to do, and when to do can make you feel more at ease in a professional situation and can help you present the positive image you want to project. Remember: "Do not be afraid of mistakes, providing you do not make the same one twice." - Roosevelt.

a. Be thoughtful at all times.

b. Keep a promise and confidences.

c. Try to find something good to say about others.

d. Be friendly, but respectful.

e. Laugh with people, not at them.

f. Remember to say "Please" and "Thank you".

**g. Appreciate other's time and be on time yourself.**

**h. Put others at ease.**

i. Never tease someone to the point of tears.

j. Tidy-up after yourself and return items to their proper place.

k. Avoid smoking, chewing gum, or eating in public.

l. Hold the door open until the other person can catch it.

m. Do not call attention to yourself by making a great deal of noise in public places.

n. Accept a compliment with a smile and a "Thank you".

o. Use ashtrays for smoking, never the floor or a saucer.

p. Always say "No" as politely as possible without hurting other's feelings.

q. Good table manners are always in order.

- (1) Wait until others have been served before you start.
- (2) The napkin goes in your lap.
- (3) Elbows are never on the table.
- (4) Don't reach across someone else's place.
- (5) A glass with a stem is held by the bowl.
- (6) Spread butter and jelly only on small pieces of bread.
- (7) Never leave a spoon in the glass or cup.
- (8) When in doubt about silverware, choose the piece fartherest to the left or right first.
- (9) If you drop something on the floor, leave it unless it is in a dangerous position.
- (10) Chew with your mouth closed.
- (11) Toothpicks are for private use.
- (12) When in doubt, follow the lead of your host or hostess.

r. A gratuity should always be given for service rendered--the rates will vary according to the service.

s. When attending meetings and conferences, you should remember who and what you represent and should put your best foot forward at all times to project a positive, self-confident image. [CTIB 091-00-11]

## II. Pre-Employment Skills (PR-4)

### A. Job Seeking

There are job opportunities for everybody! You only need to find the one that is right for you! Decide what kind of job you want and then work toward getting that job--by planning and preparing.

1. Career Planning

a. Conduct a self-appraisal (SA-11) (SA-12; PR-4)

Make a review of your interests, aptitudes, and abilities.

- (1) Professional tests
- (2) School studies and activities
- (3) Hobbies
- (4) Teachers, parents, counselors, business and church persons
- (5) Newspaper and magazine articles
- (6) Career publications

b. Determine life goals

Consider how you would like to live, the environment in which you would like to live, and your ultimate life goals.

c. Take action (SA-13; PR-4)

Examine the career cluster for possible advancements, research career information, and develop a plan of action to secure the necessary education and skills required.

Prepare written summary of career plans

- (1) Career field information
- (2) Long-range goals
- (3) Occupational possibilities
- (4) Year-by-year plans for accomplishments
- (5) Annual self-inventory of attainments

2. Locate Prospective Employers (PR-4; pp. 70-74)

a. Get suggestions from friends and relatives.

The more people know, the better are your chances for making contacts with employers. Companies are generally interested in employee recommendations made by their current employees.

b. Visit placement bureaus and employment agencies.

Make sure you understand your financial obligations to the agency. Many companies offer "fee paid" placements through agencies. (Fee paid means that the company hiring the employee will pay the financial obligation to the agency for the new employee).

c. Examine help-wanted advertisements. (SA-14)
d. Make "cold contacts" by applying directly to the business.
e. Write your own ad under "Positions Wanted".

B. Letter of Application, Resume, Applications

1. Letter of Application (PR-4; pp. 87-90) (PR-15; p. 42-43)

Usually your first opportunity to make direct contact with a prospective employer; therefore, it is a must to make a favorable impression.

a. Reasons for writing

(1) Use as a cover letter for mailing resume.
(2) The company requests a letter of application.
(3) Use in answering want-ads.
(4) The company is located out-of-town.
(5) A personal contact is not yet appropriate but you wish to solicit for a position.

b. Rules for writing

(1) Type neatly and correctly on quality bond lettersized paper.
(2) If possible, address the letter by name to the appropriate person in the firm.
(3) Be clear, brief, and businesslike--if at all possible, no more than one page.
(4) The first paragraph should state the reason for writing.
(5) The second and third paragraph should discuss your qualifications as given in your resume--sell your abilities.
(6) The fourth and final paragraph should encourage the employer to contact you for an interview and explain how--be sure to include a thank you statement for consideration of your application.
(7) Proofread carefully and check for smudges or poor erasures.
(8) Keep a carbon copy, but always mail the original to the prospective employer as machine and carbon copies are considered impersonal. (HO-5) (SA-15) (SA-16) (SA-17)

2. Resume (PR-4; pp. 77-82)

A resume is a summary of basic information about you that an employer may scan and appraise in view of your possible employment.

a. Purpose of resume

(1) To stimulate interest of an employer
(2) To obtain an interview for the prospective employee
(3) To save time in the interview process

b. Organization of resume (may be written in variety of forms depending on purpose)

(1) Personal data
(2) Position for which you are applying
(3) Educational background
(4) Special skills
(5) Activities and interests
(6) Work experience
(7) References

c. Guidelines

(1) Limit to one page if at all possible.
(2) Be honest.
(3) List job and educational experience in reverse chronological order.
(4) Emphasize duties most related to the job for which you are applying under job experience--give employers' names and addresses, type of business, your job title, and responsibilities.

PLANNING NOTES

(5) Eliminate irrelevant or unimportant details.
(6) Use simple words and avoid slang.
(7) Do not use abbreviations.
(8) Use present tense in describing your **Current** job; past tense in other descriptions.
(9) Make your resume neat and eye-appealing.
(10) Type and proofread carefully and have professional-looking copies made if possible. (HO-6) (HO-7) (SA-18)

3. Application Forms (PR-4; pp. 109-115)

a. Purpose of application forms

(1) As a basis for hiring or not hiring employees.
(2) As an indication of an applicant's abilities.
(3) Determines how well an individual can follow directions, understand questions, and organize answers.
(4) Gives some indication of neatness, thoroughness, spelling, and writing abilities.

b. Guidelines for completing

(1) Have necessary materials on hand--pen and pencil, erasure, social security card, resume.
(2) Read the entire form thoroughly before answering any questions.
(3) Read and follow the instructions.
(4) Complete all blanks--write "NA" or "Not Applicable" if an item does not apply to you
(5) Provide honest, complete and accurate information.
(6) Be as neat as possible--if you mess up badly, ask for another form.
(7) Spell correctly and fully.
(8) Use pen with black or blue ink.
(9) Sign the form properly if requested. (SA-19, PR-17)
(10) Review completely what you have written. (SA-20, PR-17)

C. Job Interview (HO-9)

1. Secure Appointments for the Interview. (HO-8)

a. By telephone
b. By personal visit to business
c. By telephone

2. Know About Your Prospective Employer.

a. What does the company make or do?
b. What and where is the market for the product?
c. Who uses the product or service?
d. What is the status of the company?
e. Does the company have a training program?
f. What are company relations with its employers?
g. Who is in charge of hiring personnel?

3. Be well groomed--your apparel reflects your attitude. (SA-21) (SA-22)

4. Remember how important personality is.

a. Be positive.
b. Be industrious.
c. Be honest and loyal and exhibit integrity.
d. Be courteous.
e. Be tactful.
f. Be enthusiastic.
g. Be confident--but not cocky.

(1) The first few minutes are most important.
(2) Introduce yourself if the receptionist fails to do so.
(3) If the interviewer offers to shake hands, do so--however, it is most proper for a woman to offer her hand first.
(4) Wait to sit down until you are asked to do so by the interviewer or receptionist.
(5) State the purpose of your visit,

5. Be able to answer briefly and concisely the employer's questions. (HO-9)

6. Close the interview pleasantly.

When it appears that the interviewer has all the information needed and is apparently terminating the interview, it is time for you to rise and leave. Ask whether you should telephone the interviewer for a decision or whether you can be expected to receive a call from the interviewer--get a definite time period, such as a week or two weeks.

PLANNING NOTES

D. Follow-up

1. Send a letter of appreciation.

   Write a letter of thanks to the interviewer for consideration shown you and reaffirming your interest in the company and the kind of work involved.

2. Make out a future reference card

   Make out a card with the name of the company, the names of the people you met, the date of the interview, the type of job, a summary of the interview, and the date you should call back or can expect to hear from the interviewer.

(SA-23; PR-17)
(SA-24)
(SA-25; PR-4)

III. Professional Ethics

A. Characteristics of Good Employee

1. Dependable in the work environment

(PR-3; p. 125)
(SA-26; PR-14)

   The dependable employee can be "counted on" to exhibit responsible behavior. They can be trusted to do what they say they will do and what is expected of them.

   a. They get to work on time.
   b. They are agreeable to working extra hours when necessary.
   c. They are on the job when they should be.
   d. They carry out their assigned tasks and remember to do the little details.
   e. They like their job and put it ahead of personal matters that might interfere.

[CTIB 093-00-11]

2. Accomplishes goals and objectives

(PR-17; pp. 5-11)
(SA-27; PR-14)

   "A winner never quits; and a quitter never wins."

   a. Types of goals

      (1) Long-range goals--those which require several months or years to accomplish.
      (2) Short-range goals--give quick satisfaction and usually lead toward long-range goals.
      (3) Tangible goals--easiest goals to measure since we know their existence through the senses.
      (4) Intangible goals--difficult to measure since they are more emotional and internal.

   b. Importance of setting goals

      (1) Gives you something to work toward.
      (2) Forces the setting of priorities.
      (3) Makes you responsible for your success.
      (4) Makes you aware of your strengths and weaknesses.
      (5) Makes you aware of realities.
      (6) Gives a sense of past victories.
      (7) Improves self-image.
      (8) Helps you take action.
      (9) Sharpens decision making abilities.

   c. Guidelines for setting goals

      (1) Must be your own personal goals--should require you to do more of something or to do it better or differently.
      (2) Must be stated positively.
      (3) Must be realistic and attainable--be ambitious, but set reachable.
      (4) Must be specific--should describe a specific end result; keep striving to reach other goals.
      (5) Must be written--written goals can be changed, however, since they are not chipped in granite.

[CTIB 092-00-11]

3. Plans and schedules work tasks and assignments

(SA-28, PR-13) (SA-29; PR-5)

   a. Importance of Time Management

(PR-13; pp. 2-4)
(SA-30; PR-13)

      Time Management-planning, scheduling, and using time efficiently

      (1) Helps reduce stress, frustration, and anxiety.
      (2) Increases productivity and reduces costs.

   b. Benefits of Time Management

      (1) You control time, time does not control you.
      (2) Productivity increases.
      (3) Efficiency is greater--less wasted time.
      (4) Eliminates procrastination.

(5) Conserves your energy, physical and mental.
(6) Improves health.
(7) Gives psychological lift.
**(8) Eliminates mistakes and duplication.**
(9) Allows for refinement and development of interpersonal relationships.
(10) Motivates others to use time wisely.

c. **Steps** in Planning

**(PR-13; pp. 13-17)**
(SA-32; PR-14)

(1) Make planning a habit (daily, weekly, yearly).
(2) Set priorities using ABC system.
  (a) A-High Value--urgent and important.
  (b) B-Medium Value--important, but not urgent.
  (c) C-Low Value--least important, not urgent.
(3) Be flexible.
(4) Delegate when possible (this is not to give you "slack" time).
(5) Set aside creative time.
(6) Follow plans.

[CTIB 094-00-11]
[CTIB 094-00-12]
[CTIB 094-00-13]

4. Demonstrates good work habits

a. Patience

(PR-6; pp. 14-16)

"Patience is a virtue." Patience can only be achieved through tolerance and understanding of others and self-control and self-discipline of ourselves.

b. Punctuality

(PR-3; p. 130)

Being on time for appointments, with assignments, for social engagements, and to the job can be representative of your mental attitude, and your mental attitude can be the determining factor in your success or failure. Other people's time is just as valuable as yours.

c. Orderliness

(SA-32; PR-14)

(1) Organized behavior is crucial to business success.
(2) Benefits of being organized:
  (a) Productivity increases;
  (b) Accuracy and efficiency improve;
  (c) Rewards--praise, promotions, self-pride
(3) Steps in organizing activities
  (a) Identify the activities.
  (b) Classify the activities.
  (c) Put priorities on the activities.
  (d) Schedule the activities.
  (e) Perform the activities.

[CTIB 095-00-11]
[CTIB 095-00-12]
[CTIB 095-00-13]

5. Adjusts to demands of job requirements

Self-management is the key to making the best possible use of time so that the amount of time spent will automatically be more profitable, not only in the quantity of work performed, but in the quality of work performed. "People don't lack time--they just don't use it effectively." (Alan Lakein).

a. Plan.

Know the difference between "prime time" (the most productive hours in the day for you) and "availability time" (the best time to take care of the needs of others

b. Organize.

(PR-13; pp. 19-20)
(SA-33; PR-13)

Recognize your abilities and responsibilities. When at all possible, delegate tasks to others when deadlines, pressures, and conflicts are strongest.

c. Control.

(SA-34; PR-12)

Schedules indicate a planned series of events and serve as a time-control aid. Schedules help avoid procrastination and daydreaming--thus allowing for more efficiency and productivity.

[CTIB 096-00-11]
[CTIB 096-00-12]
[CTIB 096-00-13]

6. Exercises self-control

(PR-2; p. 21)
(SA-35; PR-2)

a. Degree of control varies from person to person.
b. Experiences and environments are determining factors.
c. Has considerable influence on your job and success in life.
d. Socially acceptable outlets can help in learning to control.

e. You can gain control if you want to and are willing to work at it.

   (1) First, recognize that the emotion is causing a problem--it is affecting the opinion others have of you.
   (2) Second, make up your mind that you want to control the emotion.
   (3) Third, determine what situations or people set off the undesirable emotion.
   (4) Fourth, use your mind to overcome the emotion so that you do not express it--even though you may feel as though you would like to explode.

7. Maintains an objective point of view

Evaluate the situation without allowing personal biases, prejudices, or needless emotions to get in the way of good judgment. A person's own feelings must be put aside as well as their emotions, and the situation evaluated based upon all the facts that are available.

a. Importance of maintaining objective views

   (1) More accurate conclusions are drawn.
   (2) Problems are solved more appropriately.
   (3) Situations are evaluated more accurately.
   (4) "Fairer" treatment is given to both parties.
   (5) Personal feelings are put aside.
   (6) More than one side of the issue is seen.

b. Ways to maintain objectivity

   (1) Do not allow biases and prejudices to interfere.
   (2) Gather all information.
   (3) Study the facts.
   (4) Understand all points of view.
   (5) Investigate all sides of the issue.

8. Demonstrates appropriate ethics

a. Loyalty

   (1) Be genuinely concerned about the company and protect its interests.
   (2) Do not destructively criticize.
   (3) Know when to keep confidences.
   (4) Do not habitually complain or gripe to fellow employees.
   (5) Give 100 percent of your efforts.

b. Honesty and Integrity

   (1) Take care in handling money.
   (2) Be completely honest in handling merchandise.
   (3) You are paid for your time--don't steal it.

9. Establishes and maintains credibility

Credibility is achieved when someone believes and has confidence in someone or something else; it is achieved by developing and maintaining a favorable image.

a. With customers
b. With co-workers
c. With supervisors

10. Utilizes appropriate assertiveness

Too many people never challenge their abilities simply because they are afraid of failure. Self-confidence gives us the feeling of trust, reliance, and self-assurance necessary to exert our ideas and talents so that our full potentials may be realized.

11. Demonstrates initiative in dealing with others

A desirable employee is a willing worker who finds satisfaction and enjoyment in their job. People may be classified into three categories:

a. Those who make things happen.
b. Those who watch things happen.
c. Those who wonder what happened.

In order to succeed, there must be a combination of thinking and doing. The employee who expects promotions must display initiative and ambition--they cannot afford to sit back and watch things happen or wonder just exactly what did happen.

12. Assumes individual responsibility for actions and/or department and company operations

PLANNING NOTES

(SA-36; PR-12)
(SA-37; PR-17)
[CTIB 097-00-11]
(PR-3; p. 129)

(SA-38; PR-17)
(SA-39; PR-12)
(SA-40; PR-12)
[CTIB 098-00-11]
[CTIB 098-00-12]
[CTIB 098-00-13]
(SA-41; PR-14)
(PR-10; pp. 80-81, 98-99)

(SA-42; PR-17)
(SA-43; PR-14)
(SA-44; PR-4)
(PR-3; p. 127)
[CTIB 099-00-11]
(PR-10; 145-49)(PR-2; pp. 4-8)

(SA-45; PR-17)
(SA-46; PR-6)
(PR-2; pp. 21-22, 41-44)
(PR-3; pp. 95-101)
(SA-47; PR-1)
(SA-48; PR-12)
[CTIB 101-00-11]

(SA-49; PR-1)
[CTIB 110-00-11]
(SA-50; PR-14)
(PR-2; pp. 105)

PLANNING NOTES

The person who progresses in business is the one who uses good judgment, initiative, and drive in performing tasks and does not make excuses for making mistakes nor blame the mistakes on others. It is the employee's responsibility to know what duties are to be performed before agreeing **to do them and to seek clarification when the duties are not well-defined.**

a. Irresponsible employees have negative effects:
   (1) on customer relations;
   (2) on co-worker relations;
   (3) on company profits.

b. Ways to demonstrate responsible behavior
   (1) Know your job tasks and perform them well.
   (2) Ask questions.
   (3) Do what you say you will do.
   (4) Observe the rules.
   (5) Don't infringe on others.
   (6) Assist others.
   (7) Admit your mistakes.
   (8) Don't blame others.

[CTIB 103-00-11]

13. Assumes shared responsibilities for success or failure of work group

(SA-51; PR-2) (SA-52; PR-13)

It is very difficult, if not impossible, for a company to have success without the cooperation of each employee assuming their responsibilities. In business, the process of dividing the responsibility, authority, and work of the business into smaller units is called organization.

a. Rules of Organization

(PR-2)

   (1) Clear-cut lines of authority and responsibility should be established.
   (2) Each employee should report to only one immediate supervisor.
   (3) Responsibility should always be accompanied by the corresponding authority.
   (4) The supervisor should remain responsible for the acts of employees regardless of how work is delegated.
   (5) Line functions should be separated from staff functions when possible.
   (6) Recognize the limited abilities of a single person versus a work group.

b. Reasons for failure
   (1) Poor communication techniques
   (2) Jealous employees
      (a) Spends time and energies showing up weak points of others.
      (b) Has difficulty in remaining objective.
      (c) Has difficulty accepting constructive criticism.
   (3) Uncontrolled anger
   (4) Fear--prevents individual from becoming an effective employee by causing hasty decisions or no decision at all.
   (5) Greed--causes a person to be concerned only with themselves.
   (6) Irresponsibility

(SA-53; PR-1) (SA-54; PR-12)
[CTIB 104-00-11]

14. Maintains quality in interpersonal relations

(SA-55; PR-14)

An interpersonal relationship exists when two or more persons are "inter-dependent"--this is to say they need or rely upon one another or some reason.

a. The number one reason for people losing or leaving their jobs is poor interpersonal relationships.
b. The most important thing any work group has in common is that they should be working toward the goals of the business.
c. Group harmony and group effectiveness or productivity are directly related--personality conflicts greatly reduce the quality of work **performance of the group.**
d. Technical skills are essential--but so are basic human relation skills.

**(SA-56; PR-17)**
[CTIB 105-00-11]
[CTIB 105-00-12]

15. Uses success or failure constructively

We learn certain behaviors from our trials, our successes, and our failures. From the time we were born we learned that certain behaviors were rewarded or punished. Whether or not we succeeded or failed in securing what we wanted is perhaps partly responsible for the way we presently react to success or failure. "If at first you don't succeed, try, try again"--but maybe you'd better use a different approach!

a. Use success for improvement.

PLANNING NOTES

(1) Look at your success realistically and objectively.
(2) Do not take credit for someone else's efforts.
(3) Analyze how and why your efforts were successful.
(4) Accept praise graciously.
(5) Do not let success lessen your efforts next time.
(6) Remember it is effort and a positive attitude that creates success not the success itself that creates more success.

b. Use failure for improvement.

(1) Look at the failure or mistake realistically and objectively.
(2) Analyze how and why your efforts were a failure.
(3) Do not "pass the buck" when you make the mistake.
(4) Accept constructive criticism in the form of advice and instruction.
(5) Do not be afraid to try again.
(6) Do not become negative or depressed in your attitude.

[CTIB 106-00-11]
[CTIB 106-00-12]
[CTIB 106-00-13]

16. Works cooperatively with others

The majority of workers quit or lose their jobs simply because they do not get along with other people. Working cooperatively with others is an important requirement for job success.

a. Cooperative working relationships

(SA-57; PR-14)

(1) Individuals working harmoniously together toward common goals.
(2) Individuals are free from ill-feelings, misgivings, jealousy, and skepticism.
(3) Relationships are built on mutual trust and cooperation.
(4) Helps to avoid conflicts, unnecessary problems, and the risk of losing a job.
(5) The employee has an understanding of themselves and of others in the work situation.

(SA-58; PR-14)

b. "Knowing" brings understanding

(PR-1; pp. 21-26)

In order to work cooperatively and harmoniously an employee needs to understand himself and others. Self-understanding is the recognition of personal attitudes, skills, needs and motivating factors.

c. Build cooperative relationships

(PR-1; pp. 85-88)

(1) Take pride in your work.
(2) Respect others and treat them honestly and fairly.
(3) Show interest and consideration for others.
(4) Maintain an objective point of view.
(5) Assist and cooperate with others.
(6) Maintain a positive attutude.
(7) Place business objectives before personal objectives.
(8) Carry your share of the work.

(SA-59; PR-14)

(SA-60; PR-17) (SA-61; PR-12)

17. Demonstrates knowledge that needs, desires, and goals of individuals vary

[CTIB 107-00-11]
[CTIB 107-00-12]
[CTIB 107-00-13]

Understanding the behavior of human beings is not an easy task. Nevertheless, it is important to maintain good relationships with co-workers.

(PR-1; pp. 105-128)

a. Empathize--put yourself in the other person's position to see if you can figure out why that person behaved in a particular way.
b. Treat your co-workers as individuals.

(1) Learn their names and something about them but try not to pry into private matters.
(2) Take an interest in them and try to get them involved.
(3) Be a good listener--but don't sacrifice company time for personal problems.
(4) Try not to talk about yourself all the time.

c. Maslow's **"need satisfaction" theory** of human behavior

(SA-62; PR-14)

Maslow defines the term "needs" as the things that people must have in order to lead full and happy lives.

(1) Basic Needs

(a) Physical
(b) Safety
(c) Social
(d) Self-esteem
(e) Self-fulfillment

(2) Unsatisfied needs motivate--satisfied needs do not.
(3) Needs affect interests, values, motives, and behavior.

(SA-63; PR-14) (SA-64; PR-8)
[CTIB 108-00-11]

B. Customer-Related Relations

1. Misrepresentations

Misrepresentation is the act of giving a false or wrong impression about something or someone.

**a. Ways to avoid misrepresentations**

(1) Collect all of the facts.
(2) Interpret the facts accurately.
(3) Communicate the facts honestly.

b. Importance of avoiding misrepresentations

(1) Policies--more successful business.
(2) Products--builds and maintains customers.
(3) People--makes for harmonious relationships.

2. Customer complaints and company policy

Company policies are rules that guide employees in making decisions.

a. Importance of company policies

(1) Builds goodwill for the business:

(a) customers;
(b) employees;
(c) suppliers;
(d) competitors;
(e) community.

(2) Reduces confusion or disagreement.
(3) Maintains high employee morale.
(4) Establishes basic guidelines for decision making.
(5) Ensures fair and consistent treatment of customers.

b. Learn and follow policies.

(1) Become thoroughly familiar with policies;

(a) Written;
(b) Unwritten.

(2) Follow directions.

(a) Listen.
(b) Ask questions.
(c) Take notes.

(3) Courteously explain to customers.

c. Report to supervisor problems for which there is no established policy.

C. Employer-Employee Relations

1. Suggestion of Changes to Management

a. Leadership Styles

People in management positions are employed to be leaders and are expected to guide the efforts of their employees. They are responsible for making sure the company goals are being achieved in the most efficient and productive manner.

(1) Authoritarian--be a follower with this leader as they may feel threatened by initiative, creativity, and assertiveness.
(2) Democratic--develop your abilities and act somewhat independently for a satisfactory working relationship.
(3) Laissez-faire--little or no control allows you to devise your own solutions, make your own plans and decisions in this "hands-off" situation.

b. Communications

Many of the misunderstandings which arise between management and employees are the results of a communications breakdown.

(1) Do not argue or criticize.
(2) Ask questions to clear up misunderstandings.
(3) Control your temper.
(4) Show your supervisor you are interested by the way you think, act, and listen.
(5) **Try** to see your **supervisor's** point of view.
(6) You cannot communicate effectively if you do all the talking.
(7) Choose the right time, right place, and right way to say it.

PLANNING NOTES

(PR-1; pp. 57-60)
(PR-10; pp. 95) (PR-2; pp. 106-10

(SA-65; PR-17) (SA-66; PR-2)
[CTIB 109-00-11]
[CTIB 109-00-12]
[CTIB 109-00-13]

(PR-8; pp. 29-35)

(SA-67; PR-6) (SA-68; PR-1
(SA-69; PR-17)
[CTIB 110-00-11]
[CTIB 110-00-12]
[CTIB 110-00-13]

(PR-8; pp. 345-350)

(SA-70; PR-14)

(SA-71; PR-6) (SA-72; PR-1
(SA-73; PR-17) (SA-74; PR-
[CTIB 111-00-11]
[CTIB 111-00-12]
[CTIB 111-00-13]

2. Constructive criticism and Corrective Actions (HO-17)

   Suggesting to the staff better methods of performing a job is the job of the supervisor. Remember that you are not being criticized as a person--you are merely receiving suggestions concerning your actions as an employee. Keep your emotions out of the situation and adjust your business conduct accordingly.

   a. Distinguish between criticism offered for your improvement versus one used by the critic to make them feel superior to you.
   b. Distinguish between justified versus unjustified criticism.
      (1) Do not let the situation get out of hand by concentrating on it.
      (2) Defend yourself politely, but briefly.
      (3) Prove your point through your quality of work.
   c. Using constructive criticism [CTIB 112-00-11]
      (1) Recognize that you made a mistake.
      (2) Ask yourself, "What can I learn from this criticism?"
      (3) In order to improve, you must change your behavior.

# STUDENT ACTIVITIES

# PRE-EMPLOYMENT SKILLS

Complete "Factors That Affect Personality" on page 23. SA-1

Complete Jeffrey's, Mini-Simulation 9, Incident 6, pp. 228-229. SA-2

Complete Self-Evaluation for Men, p. 57, or Self-Evaluation for Women, p. 58 in Dress to Impress. SA-3

Read pages 126-129 in Dress to Impress. SA-4

View "Young Fashion Forecast" (available from Consumer Information Services, Dept. 703--Public Relations, Sears, Roebuck and Co., 7401 Skokie Blvd., Skokie, IL 60076). SA-5

Assume you have just been employed as a buyer for Logan's. You were anticipating this employment change and have saved $750 to spend in up-dating your wardrobe for success in this new job. Using current periodicals or your own sketching talents, illustrate in manual or poster form (or other choices made by the teacher and/or student) how you would spend this money to best advantage in selecting your new working wardrobe. You should explain (1) the image you are trying to project, (2) the type of customer with whom you will be dealing, (3) the geographical area where you will be working, (4) why your selected apparel and accessories are suitable for you and your position, and (5) how it will coordinate with your already existing wardrobe. (NOTE TO TEACHER: You may choose to assign this activity early in the unit as it will take some time to develop.) SA-6

Complete the student activity sheet on page 24. Answer the questions provided in two ways. First, think about how you feel about yourself; then select another person (friend, relative, teacher) to sit down and discuss how they view you. In the next class period, discuss how you agree or disagree with these comparisons of the rating sheet with a second person. Lead questions could be asked such as: Do you feel you were too hard or too easy on yourself? Do you think your friends really know you as well as you thought they did? Do you need to make some improvements and if so are you willing to change? SA-7

Complete "Is Your Self-Image Strong Enough?" on page 25. Collect sheets from all class members. Have one student read the answers to each question to see if others in the class can identify the student from the answers given on the questionnaire. SA-8

ALTERNATIVE: Have students develop a collage of illustrations they feel best represent them and their personality. See if others in the class are able to identify the student through their illustrated collage.

Read pages 15-25 in Human Relations in Marketing. SA-9

Give each student a large sheet of art paper (approximately 11 x 14) and a crayon. They should tape the sheet of paper to their backs. Each student is to write a compliment on the back of each person in the class; examples could be--pleasing personality; sharp dresser; good-looking; beautiful teeth, etc. As the students are walking around the room writing on another person's paper, make sure that everyone is participating. (Objective--There is something nice to be said about everybody!) SA-10

Complete "Fashion Aptitude Quiz" on pages 26-27. SA-11

Complete Getting the Job, Project 1, pp. 21-22. Read pages 3-6. SA-12

Complete Getting the Job, Project 2, Part 3, p. 24. (Complete this activity for only the job that is your first priority.) SA-13

Complete "Reading the Want Ads in the Paper" on page 28. SA-14

Read the Case Study - "Help Wanted" on page 29. Use the questions for classroom discussion. SA-15

Write a letter of application using the instructions on page 30. Refer back to SA-14 for the want-ad. SA-16

Correct the letter of application on page 32 by correcting the grammar and filling in any details that are missing. SA-17

Develop a personal resume. SA-18

Complete **Jeffrey's**, Mini-Simulation #1, Incident #1, pp. 7-8. SA-19

Complete **Jeffrey's**, Mini-Simulation #1, Incident #2, pp. 9-10. SA-20

Have a "Practice Day" when each student comes dressed to apply for a particular job at a store of their choice. Have the class discuss each student's choice of apparel and accessories, giving both compliments and helpful suggestions. Each student should be graded on how appropriately they have chosen what to wear. SA-21

Read HO-10 and refer back to HO-3. Ask several different students to volunteer to bring to class one of the following business outfits: SA-22

1. an appropriate outfit for the salesperson (male/female) in a department store's mature fashion department.
2. an appropriate outfit for the salesperson in a teen speciality fashion shop, male/female.
3. an appropriate outfit for the salesperson in a high fashion women's or men's department.
4. add other type stores that would be appropriate to your particular community.

**The class should critique each outfit in relation** to the type of **store for which it was chosen. Be sure to discuss why specific items would or** would **not be desirable**. (This activity **can lead to controversial class discussions** as **students** express negative or positive feelings about dress codes.)

Complete **Jeffrey's** Mini-Simulation #1, Incident #4, p. 14. SA-23

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| | |
|---|---|
| View filmstrip #2 from Entering the World of Work. (Available from Butterick Publishing, 161 Sixth Avenue, New York, New York 10013; 1975) | SA-24 |
| Complete "Pacing Yourself", page 117 in Getting the Job. | SA-25 |
| View Transparencies 1, 2, and 4 from Human Relations LAP 5. The discussions and descriptions on pages 2-3 will serve to acquaint you with the transparencies. | SA-26 |
| View Transparencies 1 [illegible] from Human Relations IAP 6. The discussions and descriptions on pages 2-5 will serve to acquaint you with the transparencies. | SA-27 |
| Read to the class Time Management, "Planning Your Work", page 32. This may be used as an introduction to the time management section. | SA-28 |
| You might want to suggest that the students purchase How to Get Control of Your Time and Your Life by Alan Lakein. This is an excellent book for their paperback library and can be purchased in most bookstores for $2.50. The film, "A Perfectly Normal Day" (Available from Thompson-Mitchell and Associates, 3384 Peachtree Road, N. E., Atlanta, GA 30326.) is based on Lakein's book and serves as a good supplement to this unit. | SA-29 |
| Complete Handouts #2 and #3 from Time Management. Adapt number 1 and number 17 from Handout #3 to your work and school situation. | SA-30 |
| Use Transparency #2, Time Management, page 46 as an introduction to the Steps in Planning of time management. | SA-31 |
| Use IDECC Revised Human Relations Lap 4. Transparencies #1-11 are especially applicable to this section, and the discussions on page 2 and 3 will assist in using the transparencies most efficiently. | SA-32 |
| Use Transparencies #4 and #5, Time Management, pages 48-49, to emphasize the importance of delegating to others. | SA-33 |
| Read Apparel and Accessories Case Study #4 -Combined Areas, page 137. Discuss how the situation could have been handled more efficiently to avoid all the pressures and conflicts that arose. | SA-34 |
| Complete Human Relations in Marketing, "Working with People", Problem 2, page 28. | SA-35 |
| Read Apparel and Accessories Case Studies #2--Combined Areas, page 137. Divide the class into several groups for disucssions. Bring the class back together after 5-10 minutes and compare their group solutions to the suggested given solutions. | SA-36 |
| Complete Jeffrey's, Mini-Simulation 3, Incident 13, page 139-140. | SA-37 |
| Complete Jeffrey's, Mini-Simulation 3, Incident 12, page 137-138. | SA-38 |
| Complete Apparel and Accessories Case Studies, Human Relations #3, pages 55-56. | SA-39 |
| Complete Apparel and Accessories Case Studies, Human Relations #5, pages 59-61. | SA-40 |
| Use Human Relations Lap 19, Transparencies 1-5. The discussions and descriptions on pages 2-3 will serve to acquaint you with the transparencies. | SA-41 |
| Complete Jeffrey's Mini-Simulation 3, Incident 14, pp. 141-142. | SA-42 |
| Complete Human Relations Lap 19, page 22. Use the role-playing situations for discussion in the classroom to see how the students would handle each situation. You may wish to divide the class into 2-3 groups for smaller discussions before bringing them back together to compare their solutions. | SA-43 |
| Complete Getting the Job, Case Problem 2, page 101. | SA-44 |
| Complete Jeffrey's, Mini-Simulation 3, Incidents 16, pp. 145-146 and Incidents 18, pp. 149-150. | SA-45 |
| Complete Apparel and Accessories, Experience 2-3 and Experience 2-5, page 19. | SA-46 |
| Complete Working at Human Relations "What's Your Opinion?", page 98. | SA-47 |
| Complete Apparel and Accessories Case Study #2, Human Relations, page 53, and Case Study #7, page 64. | SA-48 |
| Complete Working at Human Relations "What's Your Opinion?", page 89-90. | SA-49 |
| Use Human Relations Lap 5, Transparencies 2, 6, and 7. The discussions and descriptions on pages 2-5 will serve to acquaint you with the transparencies. | SA-50 |
| Complete Human Relations in Marketing, "Working with People", Problem 1, page 97. | SA-51 |
| Study Time Management Handouts #17 and #18, pages 40-41. Use the questions at the bottom of page 41 for class discussion. | SA-52 |
| Complete Working at Human Relations, Experience 2-2, page 18, and Experience 2-6, page 20. | SA-53 |
| Complete Apparel and Accessories Case Study, Management Case #3, page 86-87. | SA-54 |
| Use IDECC Revised Human Relations Lap 9. Use Transparency 1--the discussions on page 2 will assist you in instructions. | SA-55 |
| Complete Jeffrey's Mini-Simulation, Incident 9, page 131-132. | SA-56 |
| Use Human Relations Lap 9, Transparencies 2-7, pages 13-23. Use instructions on pages 3-4 for better understanding and assistance with transparencies. | SA-57 |

| | |
|---|---|
| Use Human Relations Lap 2, Transparencies 1 and 2, pages 9-11. Use discussion and instructions on pages 2 and 3 for assistance with transparencies. | **SA-58** |
| Use Human Relations Lap 11, Transparencies 1-8, pages 7-21. Use discussion and instructions on pages 2-6 for assistance. | SA-59 |
| **Complete Jeffrey's, Mini-Simulation 9, Incident 3, pages 223-224.** | **SA-60** |
| Complete Apparel and Accessories Case Study, Human Relations #10, pages 71 and 72. | SA-61 |
| Use Human Relations Lap 2, Transparencies 2-10, pages 9-27. Use discussion and instructions on pages 3-5 for assistance. | SA-62 |
| Read Human Relations Lap 9, "Encounter Pairs--A Program for Developing Relationships", page 33. | SA-63 |
| Read and discuss Retailing Principles and Practices, "Working With People, pages 540-541. | SA-64 |
| Complete Jeffrey's, Mini-Simulation 3, Incident 15, pages 143-144. | SA-65 |
| Complete Human Relations in Marketing, "Working with People", Problem 1, page 109. | SA-66 |
| Complete Apparel and Accessories, Experience 2-4, page 19. | SA-67 |
| Complete Apparel and Accessories Case Study, Communications Case #1, pages 16-17. | SA-68 |
| Complete Jeffrey's, Mini-Simulation 3, Incident 17, pages 147-148. | SA-69 |
| Use IDECC Revised Lap 9, Transparencies 8-11, pages 25-31. Use instructions and discussions on pages 4-5 for any assistance. | SA-70 |
| Complete Apparel and Accessories, Experience 2-6, page 20. | SA-71 |
| Complete Apparel and Accessories Case Study, Communications #4, pages 22 and 23 and Communications #11, pages 38-39. | SA-72 |
| Complete Jeffrey's, Mini-Simulation 9, Incident 1, pages 218-220. | SA-73 |
| **Use IDECC Revised, Human Relations, Lap 9, "Alternate Group Learning Activities", pages 8-9.** | **SA-74** |

500

SA-1

## FACTORS THAT AFFECT PERSONALITY

Compare two of your friends, concentrating on traits of personality that seem most striking or noticeable. Opposite each characteristic, write an A for "asset" or an L for "liability" for each friend.

| | Characteristic | Best-Liked Friend | Least-Liked Friend |
|---|---|---|---|
| 1. | Appearance | | |
| 2. | Self-confidence | | |
| 3. | Emotional control | | |
| 4. | Manners | | |
| 5. | Speech | | |
| 6. | Cooperation | | |
| 7. | Courtesy | | |
| 8. | Good sportsmanship | | |
| 9. | Loyalty | | |
| 10. | Sense of humor | | |
| 11. | Sincerity | | |
| 12. | Unselfishness | | |
| 13. | Politeness | | |
| 14. | Sympathy | | |
| 15. | Tact | | |

Compare positive traits of both friends. How do they differ?

How do you feel that you rate with your friends?

# STUDENT ACTIVITY SHEET

Answer the following questions with usually, sometimes, or rarely.

## MY PERSONALITY

1. Am I likable and congenial so that other people want to be around me?
2. Am I optimistic instead of pessimistic or gloomy when presented with a new problem or a new situation?
3. Do I like to be with other people and make the first move to meet new people?
4. Do I look for ways to pay genuine compliments about people to themselves and to others.
5. Am I tolerant of the way other people act or think, avoiding direct criticism or arguments?

## FIRST IMPRESSIONS

1. Do I take the initiative to meet, greet, and introduce strangers?
2. Am I consciously thinking about other people's interest and their comforts (instead of my own) when I talk with them?
3. Do I try to find ways of being helpful to other people when I talk with them?
4. Do I avoid controversial topics when I enter a conversation with a new acquaintance?
5. Do I avoid talking about personal aches and pains, strong personal likes or dislikes, rumors, and personal prejudices.

## MY PERSONAL APPEARANCE

1. Do I know what appropriate business dress is?
2. Do I usually feel well dressed?
3. Are my clothes clean, pressed, and in good repair?
4. Do I practice strict personal rules of cleanliness and good grooming.
5. Do my personal health habits contribute to my appearance?

## MY FACIAL EXPRESSIONS

1. When I first meet people, does my facial expression indicate genuine interest instead of pretended interest?
2. Am I usually willing to reveal how I feel through my facial expressions instead of covering my feelings with a noncommittal, deadpan expression?
3. Do my facial expressions reflect the way I want to be understood?
4. Do I avoid showing indifference or nervousness toward others in my facial expressions?
5. Do I refrain from reflecting my own personal problems or sad feelings in my facial expressions?

## MY MANNERISMS

1. Do I present an attitude of alertness, instead of an "I don't care" attitude in the way I move about?
2. Do my movements indicate a quiet poise and a purposefulness in living as opposed to an uncertain, frightened, or nervous outlook?
3. Is my posture straight without being stiff?
4. When I walk, is my weight well-distributed on both legs?
5. Do I avoid meaningless, jerking movements of the body and hands when I talk?

# IS YOUR SELF-IMAGE STRONG ENOUGH?

INSTRUCTIONS TO THE STUDENT: In the spaces provided, write an answer that you feel best describes you and your personality. The answer does not necessarily have to be your favorite flower or song, etc., but the one that you feel best interprets who and what you are as a person (that is your feelings, your body structure, your clothes, your grooming, your study habits.)

____________________ FLOWER

____________________ SONG TITLE

____________________ MOVIE TITLE

____________________ COLOR

____________________ BIRD

____________________ ANIMAL

____________________ PERIOD OF TIME IN HISTORY

____________________ MOVIE STAR OR TELEVISION

____________________ BOOK TITLE

____________________ SOFT DRINK

____________________ FOOD (Meat or Vegetable)

____________________ FLAVOR OF ICE CREAM

____________________ TYPE OF DESSERT

____________________ FRUIT

____________________ MAGAZINE

____________________ NAME OF A BUSINESS

____________________ T.V. COMMERCIAL

____________________ SUBJECT IN SCHOOL

____________________ TELEVISION PROGRAM

SA-11

## FASHION APTITUDE QUIZ

| DO YOU LIKE TO: | VERY MUCH | NOT AT ALL |
|---|---|---|
| 1. Shop for yourself? | | |
| 2. Shop for others? | | |
| 3. Arrange parties? | | |
| 4. Work by yourself? | | |
| 5. Work with others? | | |
| 6. Work with your hands? | | |
| 7. Make and keep a budget? | | |
| 8. Make clothes? | | |
| 9. Be physically active? | | |
| 10. Draw and sketch? | | |
| 11. Decorate your room? | | |
| 12. Persuade others to do things? | | |
| 13. Plan color schemes? | | |
| 14. Write letters? | | |
| 15. Go through museums? | | |
| 16. Talk to an audience? | | |
| 17. Act in or produce a show? | | |
| 18. Study fashion magazines? | | |
| 19. Wear extreme clothes? | | |
| 20. Analyze what people are wearing? | | |
| 21. Assume responsibility? | | |
| 22. Do creative writing? | | |
| 23. Meet new people? | | |
| 24. Do something different every day? | | |
| 25. Be a treasurer? | | |

Now check your checks. Listed below are some probable likes and dislikes:

FOR DESIGNING:

Likes: 1, 2, 4, 6, 8, 10, 11, 13, 15, 18, 19, 20.

Dislikes: 3, 5, 7, 9, 12, 14, 16, 17, 21, 23, 25.

If your checks agree with at least 10 of the likes and 8 of the dislikes, you will probably find your fashion field in designing.

FOR MERCHANDISING:

Likes: 1, 2, 5, 7, 8, 9, 12, 13, 18, 20, 21, 23, 24, 25.

If your choices agree with at least 12 of the likes, and if number 4 is your only strong dislike, you may be well suited for merchandising.

FOR PROMOTION:

Likes: 3, 5, 9, 12, 14, 15, 16, 17, 18, 20, 21, 22, 23, 24.

If you agree with at least 12 of the likes, and if number 4 is your only strong dislike, you may be well suited for promotion work, which usually includes selecting fashions, writing, and contact work.

This simple test may give you some idea of where your likes would lead you in the fashion field. The different points come from observing more than 2,000 young people preparing themselves for careers in the fashion field. Perhaps these points will help you find your niche.

# READING THE WANT ADS IN THE PAPER

1. Have you ever wondered how you would go about applying for a job? What would be the first thing that you would do?

_______________________________________________

Maybe the following activities will help you decide.

2. Obtain the want-ads section of a newspaper. Look through the want-ads for a few minutes and decide for which job you would like to apply if you were looking for a job.

Cut out the ad and tape it in the space below.

3. Look at the ad you have just taped to your paper. Answer the following questions about the advertisement:

   1. What type of job is advertised?

   _______________________________________________

   2. What company or person is advertising the job?

   _______________________________________________

   3. Is the salary mentioned? If so, what is it?

   _______________________________________________

   4. Are any benefits mentioned? If so, what are they?

   _______________________________________________

   5. Is any experience required for this job?

   _______________________________________________

4. Turn in your completed sheet to your teacher.

## Case Study - "Help Wanted"

Logan's Department Store has a vacancy in their men's fashion department. Mr. Allman, Director of Sales Personnel, calls the high school and asks that interested young men in the marketing and distributive education program submit letters of application and data sheets. When the letters arrive, he narrows them down to two, one from Frank Brown and one from John Hobbs.

The letter from Frank Brown contains the following: "I am certain that I can sell fashion merchandise. I get along well with people. I have always been interested in selling. Since I am about to be married, I would like a permanent position."

John Hobb's letter contained the following statements: "I am interested in men's fashions. I have studied salesmanship in my marketing and distributive education class. I have worked part-time for two years at Zebra's Variety Store and feel this experience would help me in my work."

QUESTIONS TO DISCUSS:

1. Is it better to use general or specific statements in a letter of application? Why?

2. If you were Mr. Allman, which student would you hire? Why?

3. How could Frank Brown have used specific statements as evidence that he gets along well with people?

4. Is marriage a good selling point? Why or why not?

# A LETTER OF APPLICATION

1. You are now going to answer the ad for a job that you found in **SA-14**. First, you will need to write an application letter. This letter will introduce you to the company or person to whom you are applying and will ask for an interview.

2. An application letter carries a great deal of importance for it determines whether or not you are accepted for an interview. Your letter should be neat and concise, and never longer than one page.

   A rough draft should be written first so you will be able to iron out all of the errors. Give your rough draft to your teacher to check over before you begin your final copy. The final copy of your application letter should be typed or written neatly in ink.

   In your application letter, your organization is extremely important. Be sure to include the following items. Read these below as you follow along with the examples on the next two pages:

   1) First, place your address and today's date in the upper right-hand corner. This is known as the heading. Place it 12 lines from the top of the page.
   2) Then, place the person's or company's name to whom you are writing on the left-hand side, 4 lines down from your date.
   3) Go down 3 lines and place the salutation. A salutation is a way of starting your message by indirectly saying "hello". Examples: Dear Sir: Gentlemen: Dear Mr. Jones:
   4) The body of the letter starts 2 lines down from the salutation. The body of the letter is your message. Start a new paragraph everytime you have a new idea.
      (1) The first paragraph should include your reasons for writing.
      (2) The second paragraph should include your qualifications and experience.
      (3) The third paragraph should include your references.
      (4) The last paragraph should include your offering yourself for an interview.
   5) The close should bring the letter to an end. Place this on the right, 2 lines below the body of the letter. "Yours truly", can be used for most business letters.
   6) Four lines below the close, place your signature. Use your full name, but never use Mr., Mrs., or Miss.

3. Carefully study the instructions. Now, you can start writing your application letter answering the ad that you found in the newspaper. Write your rough draft--get this approved by your teacher--then you may start on your final copy. (You may type or write neatly in ink.)

4. After you have completely finished your final copy of your application letter, turn in the letter to your teacher.

## THE APPLICATION LETTER

(HEADING)

Street and Numbers ________________
City, State, and Zip ________________
Date ______________________________

__________________________Name of company or person
__________________________Street and Number (INSIDE ADDRESS)
__________________________City, State, and Zip

__________________________Salutation

BODY: First paragraph--Purpose or reason for writing

Second/third paragraph(s)--Submit qualifications and experiences

Fourth paragraph--Offer yourself for an interview

COMPLIMENTARY CLOSE ________________

SIGNATURE __________________________

SA-17

## CORRECTING LETTER OF APPLICATION

INSTRUCTIONS TO STUDENT: Attached is a letter of application which lacks important information. Re-write the letter using correct grammar and filling in any details you find missing. Remember that your letter must be distinctive if it is to stand out from the many that will be received.

245 West 10 Street
Chicago, IL 60617
September 5, 1983

Mr. John J. Case, Manager
Logan's Department Store
28 Garth Avenue
Chicago, Illinois 60635

Dear Mr. Case:

I am applying for a position with your company because I have heard many good things about the benefits you provide, and I am certain I would like it there. A large company like yours must have many opportunities for young people.

I am a graduate of high school and have had one year additional business training. I am 20 years old, single, and in excellent health.

My business experience includes one year with the Revco Manufacturing Company, where I worked for one of the division managers. If you wish to check my business experience there, I am certain that the company will be happy to supply you with any information that you will require.

I hope that you will be interested in using my services. If you will arrange an interview sometime in the near future, I shall be happy to meet you and discuss my qualifications in detail.

Yours sincerely,

Thomas F. Grady

## Unit VII - Employment Skills

HO-1 Importance of Dress
HO-2 Ask Yourself . . .
HO-3 Professional Success
HO-4 Developing a Strong Self-Image
HO-5 Letter of Application
HO-6 The Resume
HO-7 Sample Resume
HO-8 Arranging For An Interview
HO-9 The Interview
HO-10 Questions You Should Be Prepared To Answer

## TO SAVE MONEY AND MISTAKES
## ASK YOURSELF . . . .

1. Does the look have double-life possibilities? For example, can it go from the office to a casual occasion, and further into a dressy look with the right change of accessories. If it can't, can you afford the luxury?
2. Will it work into your wardrobe with other pieces you already have? ---such as shoes, coats, jackets, etc.
3. Is the color right with your skin tone and hair tone?
4. Is the fabric right for your geographic area in which you live and can it adapt to others when you travel, and will it work for at least three seasons of the year?
5. Is it of the quality and design that will fit into your daily life style for durability and wear?
6. Do you feel comfortable in it psychologically--is the style too tailored or too high fashion or trendy for you?
7. How long will it be fashionable?
8. Will you have more than one opportunity to wear it?
9. Does it fit you to perfection or will the alterations really be worth the effort and the price?
10. AND MOST IMPORTANT OF ALL---DO YOU REALLY LOOK GREAT IN IT?

## HOW 100 TOP EXECUTIVES DESCRIBED SUCCESSFUL DRESS

| | ANSWERS | |
|---|---|---|
| | YES | NO |
| 1. Would they choose people in lower middle class dress as their assistant? | 92 | 8 |
| 2. Asked if they would hire the man in the long hair? | | 74 |
| 3. Does your company have a written or unwritten dress code? | 97 | 3 |
| 4. Would a number of people at your firm have a much better chance of getting ahead if they knew how to dress? | 96 | 4 |
| 5. If there were a course in how to dress for business, would you send your son or daughter? | 100 | |
| 6. Would you hold up the promotion of a person who did not dress properly? | 72 | 28 |
| 7. Do you think employee dress affects efficiency? | 52 | 48 |
| 8. Do you think employee dress affects the general tone of the business? | 100 | |
| 9. Would you tell a young person if dress was holding them back? | 80 | 20 |
| 10. Does your company at present turn people down that show up for job interviews improperly dressed on that basis alone? | 84 | 16 |
| 11. Would you take a young person who did not know how to dress for your assistant? | 92 | 8 |
| 12. Do you think there is a need for telling people how to dress? | 100 | |

# HOW TO WRAP THE PACKAGE
# FOR PROFESSIONAL SUCCESS

According to William Thourlby, author of You Are What You Wear, the Golden Rule is "to remember that the man who packages himself to turn off the least number of people gets the greatest opportunity." This rule applies to men as well as to women in business.

## GENERAL GUIDELINES

1. If you have a choice, wear expensive looking clothes.
2. Always dress as well as the people you are calling on.
3. Avoid gaudy jewelry--keep it functional.
4. Develop a clothing personality that makes you memorable.
5. Suit jackets should be worn at all times to maintain authority.
6. When not sure what to wear, dress more conservatively than normal.
7. Avoid school rings, names on clothing, political buttons, religious symbols, or anything that would tie you to a particular group or belief.

## FOR MEN

1. Wear traditional classic suits in good-quality wool blend or wool.
2. A white shirt with straight collar is preferable.
3. Brown or black shoes are preferable. (For the professional business man wing-tipped lace shoes are suggested.)
4. A leather briefcase should be used as plastic says all the wrong things.
5. Regimental ties are a professional look. The knot should look natural and the tie must touch the belt buckle.

## FOR WOMEN

1. Wear a good-quality tailored suit or dress in a neutral color such as gray, beige, navy or black. A scarf or blouse can add a touch of color.
2. Hose should be in shades of beige, not colored or decorated.
3. The professional ladies' shoes should be pumps or slingbacks. Backless mules, clogs and sexy, strappy sandals are not businesslike.
4. A good leather handbag that is not too large, or a good leather briefcase should be carried, but not both at the same time.

# DEVELOPING A STRONG
# SELF-IMAGE

The following list of statements describe high achievers who have developed strong self-images. Which ones could help you achieve your desired self-image?

1. You are taking steps to put your personal life in order.

2. You can stay with a task until it is completed.

3. You have listed your life goals, your short-term goals and your "right now" tasks and are doing the requirements of each.

4. You adjust quickly to changes in situations, places, and people without suffering a lot of depression, anxiety, fear or grief.

5. You anticipate success in all the things you strive to do each day.

6. You include a new interest, hobby, recreation, craft, sport, etc. in your life periodically in order to expand your mind.

7. You have a deep sense of well-being and personal worth.

8. You use your mind as a tool to direct its conscious functioning in a purposeful manner.

9. You are honest with yourself about your beliefs, the roles you are playing and what you expect to gain from them.

10. You maintain a clean, well-groomed appearance and have no destructive habits to your health.

11. You communicate clearly.

12. You do not rush or pressure others into hurrying by taking full responsibility for scheduling your time.

13. You realize that stinginess or dishonesty keeps you from a positive relationship with others.

14. You discard clothing that is unbecoming and wear clothing that reflects an attractive image.

15. You've eliminated the "wish I could" and the "should" from your vocabulary and replaced them with "I want to" and "I can."

16. You visualize yourself doing needed jobs and accomplishing your dreams.

17. You continually and inwardly compliment yourself and others for successful, completed tasks.

# SAMPLE LETTER OF APPLICATION

1982 Career Street
Anywhere, N.C. 28209
June 7, 19--

Ms. Mary Folio
Belk
409 Tryon Street
Charlotte, N.C. 28210

Dear Ms. Folio:

I am interested in becoming an assistant buyer on the Belk staff in Charlotte. I learned of this opening through your ad in the Anywhere Gazette on June 7th.

As you can see from my resume, several of my jobs and school activities have included retailing experiences that would be helpful. I have shopped at Belk stores in my area, and have been particularly impressed with their methods of marketing. The junior sportswear department in your Raleigh store has a selection of merchandise superior to any store I have been in. Since I want to become a buyer of fashion merchandise, I would especially like to receive my training from Belk.

I would appreciate an appointment at your convenience and will telephone your secretary next week to arrange for one. It would give me great pleasure to begin what I hope will be a career in retailing with a job at Belk.

Sincerely,

Sara Right

Sara Right

Enclosure

# THE RESUME

Often employers ask for a written summary of your education and training, jobs you have had and other personal information that might help you get a job. This summary is called a resume. A resume is an advertisement for you. It serves to introduce you to prospective employers and hopefully will help you in obtaining an interview. You should include a resume when sending a letter of application.

There is no one accepted format for preparing resumes. However, the following guidelines should be observed:

1. The length should not exceed one page. A resume with too much detail may distract rather than interest the employer.
2. Sentences may be incomplete - personal pronouns are not necessary. Use as many action verbs as possible.
3. A resume should always be typed and reproduced through a high quality process. Use good quality bond stationery. Never use carbon copies.
4. Be certain that your resume is error free. Have someone with good knowledge of language check spelling, etc. Misspelled words, incorrect grammar, etc. indicate carelessness.
5. The resume should be uncluttered, neatly blocked and organized. 8 1/2 by 11 inch paper is standard size.

The content of the resume should emphasize strong points and accomplishments. Emphasize the jobs, courses and activities that are relevant to the field in which you are applying. Certain basic information should be included:

## GUIDELINES FOR RESUME

1. Your names should go in the most obvious place, at the top, (do not put "Resume" at the top) with your address and phone number just below.

   Current trends indicate that you don't include irrelevant facts such as height, weight, age, sex, health, marital status, salary wanted or references (except to say they'll be supplied upon request). You will find books that suggest you include this information. Consider your situation and the job you want. Include only information that you feel will increase your chances of getting the job. If it doesn't make any difference, leave it out.

2. Job objectives should be included only if you know exactly what you want and won't take anything else. Another option would be to make the career objective general enough to cover all employment areas in which you are interested.

3. Education begins with the highest degree earned, indicating name of college attended, location, and major and minor fields of study. After colleges, mention other types of schooling (technical, extension courses, company sponsored schools, etc.) and then high school. If you have no degrees, note credit hours received.

   Use this section to highlight any academic honors you have received (dean's list, honor society, high grades in one area, etc.).

4. Work Experience starts with jobs most recently held and is listed in reverse chronological order. Give name of organization, position held, dates of employment, full-time or part-time, and a short snappy description of duties and accomplishments.

5. "Other Information" provides a place for other items of information that you feel might enhance your qualifications. Special skills, hobbies, special interests and family background are the type of things that could go here.

# SAMPLE RESUME

Sara Right
1982 Career Street
Anywhere, North Carolina 28209

(704) 332-4079

Education:

Very Best High School, 19--
(If not yet graduated: Will graduate from Very Best High School, June 10, 19--)

Business subjects studied: fashion merchandising (2 units of credit), salesmanship, sales promotion, and typewriting.

Honor Society, 19-- - 19--

Experience:

19-- - 19-- With-It Boutique, Anywhere, N.C.
In addition to working on the sales staff, I designed the window displays which were changed weekly; and assisted owner in choosing merchandise on buying trips to manufacturers.

Summer 19-- Camp Kiddy, Mudpath, N.C. Counselor.
Supervised the publishing of the camp newspaper. Wrote skits for annual musical.

Other:

President of Distributive Education Club, Very Best Chapter. Won 1st place in N.C. in Apparel and Accessories Written Event, Finalist in the nation.

Yearbook staff. Sold advertisements.

Student Council Representative

Typing - 40 w.p.m.
Cash register
Spanish, read and write

References: Available on request

## ARRANGING FOR AN INTERVIEW

Generally there are three ways that you arrange for an interview.

By telephone
By personal visit
By letter

If you arrange for an interview by telephone:

1. Make your call businesslike and courteous.
2. Speak distinctly and with confidence.
3. Give your name clearly.
4. Know the name of the person who is to interview you and how to pronounce it correctly, if possible.
5. Make a written note of time, place, and name of the person to whom you are to report.
6. As soon as your appointment is made, thank the person and bring your conversation to a close.

If you arrange for an interview in person:

1. Dress in businesslike attire.
2. Make certain you are in the right place.
3. Approach the person with confidence and sincerity.
4. Introduce yourself and state briefly that you would like to set up an appointment for a job interview.
5. Make a written note of time, place and name of the person to whom you are to report.
6. As soon as your appointment is made, thank the person and bring your conversation to a close.

If you arrange for an interview by letter:

1. Have it well prepared and properly written.
2. Type the letter unless a handwritten letter is requested.
3. Use short concise sentences with letter not being more than one page in length.

# THE INTERVIEW

"Most employers hire people because they like them." Discuss with the class or another class member why you agree or disagree with this statement. If the opening statement is true, and most people agree that it is, then the job interview is the most vital step in your search for a job. Be certain that you recognize the importance of the interview.

Remember that first impressions are lasting impressions to an interviewer. But equally important is the way you conduct yourself during the interview -- how you speak, what you say, your posture, the confidence you display. Each of these items have a bearing on the interviewer's evaluation of you as a prospective employee. Be confident, alert, and enthusiastic throughout the interview.

Your interviewer understands that it is normal to be nervous and will make allowances. Show that you have faith in your ability and that you consider yourself worth hiring. If you don't believe this, there is no reason that the interviewer should believe it. Don't beg for a job, but sell your services. Be friendly, relax and be natural.

## GUIDELINES TO FOLLOW WHEN GOING FOR AN INTERVIEW

1. Appearance is important. Be neat, clean and wear conservative dress.
2. Be on time! Plan to be there 5 to 10 minutes early.
3. Remember the receptionist judges you too.
    a. sit properly
    b. be polite, introduce yourself and state why you are there, and who you are to see.
    c. don't fidget while waiting
4. Never go with anyone -- not your best buddy, not your boyfriend or girlfriend, and not, under any circumstances, your mother or father. Getting a job is your business, and yours alone.
5. Look directly at the interviewer when introducing yourself. Be ready to shake hands, but do not offer your hand first.
6. Know the interviewer's name before you go in to the interview.
7. Remain standing until you are offered a seat.
8. Use good posture. Don't slouch, slump, wind legs around the chair, etc. Hold your hands in your lap and keep them as still as possible.
9. Use good eye contact. Don't look at the floor, your hands, or the ceiling. (Have someone talk to you while they look at these areas, and see how it makes you feel.)
10. Show self-confidence (without arrogance). Never underrate yourself.
11. Be a good listener and talker, but let the interviewer take the lead.

12. Sell yourself. Your answers should be businesslike and concise. You should not be overly aggressive, but in the course of the interview, you should stress your qualifications. You must believe that you can and will be an asset to the company. How do you do this?
13. Be enthusiastic! Act like you want the job.
14. Be interested in advancement. Let the interviewer know that you want to work up in your job. Have career goals.
15. Tell the truth, even if it may hurt you. Most employers are more willing to take a chance on someone who has made a mistake, than someone who lies.
16. Be prepared to answer questions.
17. Be prepared to ask questions.
18. Emphasize past experience if you have any.
19. Don't criticize other employers, chew gum, smoke, apply for "any job open", mention personal problems or use slang.
20. Recognize when the interview is over.
21. Thank the interviewer for his/her time, and the opportunity to discuss the job.

Do not be discouraged if the job is not offered immediately. Frequently an employer needs time to consider an applicant's qualifications, or the employer may want to interview other applicants.

It is always a good idea to follow up the interview with a thank-you note. This serves the purpose of showing your consideration for the interviewer's time and it keeps your name actively before the interviewer. If you have not heard from the interview in about a week, you may call to check on the status of your application. This lets the interviewer know that you are really interested in the job.

## STATEMENTS AND QUESTIONS THAT YOU SHOULD BE PREPARED TO ANSWER

1. Tell me a little bit about yourself.
2. Tell me about your family.
3. Describe your personality. What kind of person are you?
4. What are some things about yourself you'd like to improve?
5. What have you done - or plan to do - to improve in these areas?
6. Tell me why this company appeals to you. (What do you feel this company has to offer you?)
7. What do YOU have to offer this company?
8. Where do you see yourself headed in the future? (What are your career goals?)
9. What are your hobbies?
10. Everybody likes to criticize. What do people criticize about you?
11. What subjects in school do you like best? Like least? Why?
12. What did you like best about the previous jobs you have had and why?
13. Why do you think you would like this particular type of job?
14. Are you particularly interested in making money?
15. What job in our company would you choose if you were entirely free to do so?
16. What extra-curricular activities are you involved in?
17. What are your major strengths? Weaknesses?
18. Are you willing to travel?
19. What do you do in your spare time?
20. What irritates or displeases you most in other people?
21. What qualities do you admire in other people?

## QUESTIONS YOU CAN ASK ON A JOB INTERVIEW

1. Exactly what is expected of a person in this position?
2. What responsibilities would I have in this position?
3. What opportunities will I have to learn other jobs?
4. How would my progress be rated?
5. Are promotions usually made from within the company?
6. Does the company have a training program?
7. Is training available at my job level?
8. What kind of fringe benefits does the company have?
   a. hospitalization b. insurance c. education etc.
9. What is the company policy on raises?
10. Who would my supervisor be?
11. What would my hours be?
12. Do you have a resource library available?

# EVALUATION MEASURES AND KEYS
# (COMPETENCY / TEST - ITEM BANK)

## TABLE OF SPECIFICATIONS FOR TEST CONSTRUCTION

PROGRAM AREA Marketing and Distributive Education

COURSE NAME Fashion Merchandising

UNIT Employment Skills

| Competency | EXPECTED STUDENT OUTCOME | | | | ** Importance | Total No. of Items |
|---|---|---|---|---|---|---|
| | Cognitive Level* I | II | III | Performance | | |
| 090. Maintain appearance and health. | | | | X | | |
| 091. Demonstrate appropriate social skills in terms of self-development. | | | | X | | |
| 092. Be dependable in the work environment. | | | | X | | |
| 093. Maintain necessary endurance, forebearance, and persistence to accomplish goals and objectives. | | | | X | | |
| 094. Time management. Demonstrate effective work habits by planning and scheduling work tasks and assignments. | | | | X | | |
| 095. Demonstrate good work habits such as punctuality, orderliness, and patience. | | | | X | | |
| 096. Adjust to demands of job requirements such as deadlines, pressures, and conflicts. | | | | X | | |
| 097. Exercise self-control during trying situations. | | | | X | | |
| 098. Maintain an objective point of view in problem situations. | | | | X | | |
| 099. Demonstrate appropriate ethics such as integrity and honesty. | | | | X | | |
| 100. Establish and maintain credibility with customers, co-workers, employees, and managers. | | | | X | | |
| 101. Utilize appropriate assertiveness when working with other employees, managers, and customers. | | | | X | | |
| 102. Demonstrate initiative in dealing with customers, other employees and supervisors. | | | | X | | |
| 103. Assume responsibility for individual actions and/or department and company operations. | | | | X | | |
| 104. Assume shared responsibility for success or failure of the work group. | | | | X | | |
| 105. Demonstrate knowledge of how success or failure depends not alone on technical proficiency but on quality of interpersonal relations | | | | X | | |
| 106. Use success or failure constructively in a work situation. | | | | X | | |
| 107. Work cooperatively with other employees, supervisors, and managers. | | | | X | | |
| 108. Demonstrate knowledge that the needs, desires, and goals of individuals vary with social and cultural backgrounds. | | | X | X | | |
| 109. Avoid misrepresentations of products, services, people, and policies. | | | | X | | |
| 110. Respond to customer complaints in accordance with company policy. | | | | X | | |

*LEVEL I - Recall, II - Comprehension, III - Application

## TABLE OF SPECIFICATIONS FOR TEST CONSTRUCTION

PROGRAM AREA Marketing and Distributive Education

COURSE NAME Fashion Merchandising

UNIT Employment Skills

| Competency | EXPECTED STUDENT OUTCOME | | | | % Importance | Total No. of Items |
|---|---|---|---|---|---|---|
| | Cognitive Level* I | II | III | Performance | | |
| 111. Demonstrate knowledge of how to suggest changes to management. | X | | | X | | |
| 112. Accept constructive criticism and take appropriate corrective actions. | | | | X | | |

*LEVEL I - Recall, II - Comprehension, III - Application

COMPETENCY 090: Maintain appearance and health.

TEST ITEM 090-00-11

INSTRUCTIONS TO STUDENTS: Place an X beside the characteristics below which contribute to a favorable impression.

____ 1. Good grooming

____ 2. Serious facial expression

____ 3. Faded jeans and tee shirt

____ 4. Impatience

____ 5. Erect posture

____ 6. Pleasant smile

____ 7. Tailored suit

____ 8. Slumped shoulders

____ 9. Enthusiastic approach

10. **Extreme hairstyle**

**TEST ITEM** 090-00-12

INSTRUCTIONS TO STUDENTS: Read each of the following statements about appearance and health and determine if each statement is True or False. Write the correct response (True or False) in the blank to the left of the statement.

____ 1. In business, an employee's personal appearance is not very important as long as the employee gets his work done.

____ 2. Employees who maintain good personal appearance help create favorable impressions toward the business.

____ 3. Employees should be able to dress the way they want and not according to store policy.

____ 4. The dress of an employee runs no risks in offending or losing customers.

____ 5. Employees would probably not lose their jobs because of undesirable personal appearance.

COMPETENCY 091: Demonstrate appropriate socials skills in terms of self-development.

TEST ITEM 091-00-11

INSTRUCTIONS TO STUDENTS: In Column I are definitions or descriptions. From the words in Column II, select the one which is most appropriate for each item in Column I. Record the letter of your choice in the space provided to the left.

COLUMN I

____ 1. The physical, mental, and emotional characteristics that make up a whole person.

____ 2. The ability to learn or understand and retain knowledge.

____ 3. The way a person acts, looks, or thinks which shows his opinion toward a subject.

____ 4. The ability to think and act without being told to do so.

____ 5. The mental attitude that causes a person to want to work hard.

____ 6. An intense or eager interest in a subject.

____ 7. A strong feeling or desire, such as love or anxiety.

____ 8. Another expression for importance.

COLUMN II

A. attitude

B. emotion

C. enthusiasm

D. industrious

E. initiative

F. intelligence

G. prestige

H. mannerism

I. personality

COMPETENCY 092: Be dependable in the work environment.

TEST ITEM 092-00-11

INSTRUCTIONS TO STUDENTS: Read each of the incomplete sentences. Determine which of the completion choices is most appropriate for each statement. Write the letter of this response in the space provided to the left.

______ 1. The most prominent characteristic of dependable employees is that they

A. promise to do things they cannot fulfill.
B. do what they say they will do.
C. minimize their work and maximize their time.
D. strive for higher wages.

______ 2. If an employee in a marketing business is not dependable, the results are felt by

A. other employees.
B. customers.
C. supervisors.
D. everyone.

______ 3. ________________________ behavior is associated with fulfilling one's obligations in a responsible, reliable manner.

A. Irresponsible
B. Appropriate
C. Dependable
D. Uncooperative

______ 4. The term "dependable" means the same thing as

A. punctual.
B. casual.
C. suitable.
D. reliable.

______ 5. Being dependable has to do with fulfilling your

A. weaknesses.
B. goals.
C. obligations.
D. needs.

COMPETENCY 093: Maintain necessary endurance, forebearance, and persistence to accomplish goals and objectives.

TEST ITEM 093-00-11

INSTRUCTIONS TO STUDENTS: Read each of the incomplete sentences. Determine which of the completion choices is most appropriate for each statement. Write the letter of this response in the space provided to the left.

______ 1. Meaningful goals can give you a feeling of ______________________ in your life.

A. accomplishment
B. need
C. insecurity
D. uncertainty

______ 2. An example of a career goal is to

A. obtain a job promotion.
B. be more positive.
C. purchase a new car.
D. be more sociable.

______ 3. Goals which normally take a year or more to achieve are known as

A. immediate goals.
B. intermediate goals.
C. long-range goals.
D. short-range goals.

______ 4. Goals which are normally set for a day, week, or month are

A. immediate goals.
B. intermediate goals.
C. long-range goals.
D. short-range goals.

______ 5. Goals should always be ambitious, but

A. **realistic**.
B. ambiguous.
C. conservative.
D. convenient.

COMPETENCY 094: Demonstrate effective work habits by plannings and scheduling work tasks and assignments (time management).

TEST ITEM 094-00-11

INSTRUCTIONS TO STUDENTS: Below are given the six steps in successful planning for good time management. These steps are not listed in order. In the blank space to the left of each statement, place the number that will identify the order in which the steps should be made.

_____ 1. Delegate when possible.

_____ 2. Set aside creative time.

_____ 3. Make planning a habit.

_____ 4. Be flexible.

_____ 5. Follow plans.

_____ 6. Set priorities.

TEST ITEM 094-00-12

See TEST ITEM 095-00-11

TEST ITEM 094-00-13

See TEST ITEM 095-00-12

COMPETENCY 095: Demonstrate good work habits such as punctuality, orderliness, and patience.

TEST ITEM 095-00-11

INSTRUCTIONS TO STUDENTS: Read each of the following statements about time management and good work habits and determine if each statement is true or false. Write the correct response (True or False) in the blank to the left of the statement.

______ 1. Becoming more patient, punctual, and orderly can cause you to feel more self-centered.

______ 2. The first step in becoming more orderly and systematic is to put all of the things that you want to do in order of their priority.

______ 3. Prioritizing activities helps you to make the most effective use of your time.

______ 4. One should always make sure that the most important activities are carried out first.

______ 5. Time management in an orderly and systematic fashion should help lead you to the achievement of your own success.

TEST ITEM 095-00-12

INSTRUCTIONS TO STUDENTS: Read each of the incomplete sentences. Determine which of the completion choices is most appropriate for each statement. Write the letter of this response in the space provided to the left.

_____ 1. Using an orderly and systematic approach will usually make a person

A. tired.
B. tense.
C. more productive.
D. less productive.

_____ 2. On the job, time management and orderliness results in increased

A. costs.
B. efficiency.
C. error rates.
D. overhead.

_____ 3. For success in business, time management and orderliness are considered to be

A. desirable.
B. essential.
C. unnecessary.
D. undesirable.

_____ 4. Basically, time management and orderliness means being

A. arrogant.
B. cautious.
C. organized.
D. unorganized.

_____ 5. Better time management and orderly behavior on the job will often bring ______________________ from your supervisors.

A. criticism
B. reprimands
C. promotions
D. resentment

TEST ITEM 095-00-13

INSTRUCTIONS TO STUDENTS: Below are the five steps necessary to get organized. These steps are not listed in order. In the blank space to the left of each statement, place the number that will identify the order in which the steps should be made.

_____ 1. Schedule activities

_____ 2. Classify activities

_____ 3. Perform activities

_____ 4. Prioritize activities

_____ 5. Identify activities

COMPETENCY 096: Adjust to demands of job requirements such as deadlines, pressures, and conflicts.

TEST ITEM 096-00-11

See TEST ITEM 095-00-11

TEST ITEM 096-00-12

See TEST ITEM 095-00-12

TEST ITEM 096-00-13

See TEST ITEM 095-00-13

**COMPETENCY 097:** Exercise self-control during trying situations.

TEST ITEM 097-00-11

See TEST ITEM 110-00-13

COMPETENCY 098: Maintain an objective point of view in problem situations.

TEST ITEM 098-00-11

INSTRUCTIONS TO STUDENTS: Read each of the following statements about maintaining an objective point of view and determine if each statement is true or false. Write the correct response (True or False) in the blank to the left of the statement.

______ 1. Objectivity means being able to see only your side of the question or argument.

______ 2. The person who is open-minded or objective will give the other person the benefit of any doubt in a situation.

______ 3. In business, it is very much to your advantage to keep an open mind and to maintain an objective point of view in solving problems.

______ 4. The person who maintains an objective point of view sees no reason to allow others to question his beliefs and opinions.

______ 5. The person who looks at problem situations in an objective manner is an unhappy worker.

TEST ITEM 098-00-12

INSTRUCTIONS TO STUDENTS: Select those items that indicate an objective point of view in problem solving. Place a check mark in the blank to the left of the appropriate statements.

______ 1. Criticizes other viewpoints.

______ 2. Willing to change ideas when appropriate.

______ 3. Respects ideas and opinions of others.

______ 4. Never makes excuses.

______ 5. Resists change.

______ 6. Places blame on others.

______ 7. Maintains self-control.

______ 8. Accepts constructive criticism.

TEST ITEM 098-00-13

See TEST ITEM 110-00-13

COMPETENCY 099: Demonstrate appropriate ethics such as integrity and honesty.

TEST ITEM 099-00-11

INSTRUCTIONS TO STUDENTS: Read each of the following incomplete sentences. Determine which of the completion choices is most appropriate for each statement. Write the letter of this response in the space provided to the left.

______ 1. Some people are tempted to lie in order to ______________________________ something they might want.

A. obtain
B. accept
C. delay
D. refuse

______ 2. Dishonest behavior is often an expression of

A. satisfaction with themselves.
B. dedication to their job.
C. unhappiness.
D. happiness.

______ 3. The basic moral principles by which you live are referred to as

A. traits.
B. characteristics.
C. ethics.
D. needs.

______ 4. An employee who is loyal to the company will

A. Give employee discounts only to their friends.
B. Punch the time clock early when leaving.
C. Give 100 percent of their efforts.
D. Habitually complain or gripe to their fellow employees.

______ 5. When asked about the dishonest behavior of someone else, a person of integrity should

A. lie to protect the other person.
B. refuse to answer unless they will benefit.
C. respond honestly, but not maliciously.
D. try to avoid answering and getting involved.

COMPETENCY 100: Establish and maintain credibility with customers, co-workers, employees, and managers.

TEST ITEM 100-00-11

See TEST ITEM 110-00-13

COMPETENCY 101: Utilize appropriate assertiveness when working with other employees, managers, and customers.

TEST ITEM 101-00-11

See TEST ITEM 110-00-13

COMPETENCY 102: Demonstrate initiative in dealing with customers, other employees and supervisors.

TEST ITEM 102-00-11

See TEST ITEM 110-00-13

COMPETENCY 103: Assume responsibility for individual actions and/or department and company operations.

TEST ITEM 103-00-11

See TEST ITEM 106-00-12

COMPETENCY 104: Assume a shared responsibility for success or failure of the work group.

TEST ITEM 104-00-11

See TEST ITEM 106-00-12

**COMPETENCY 105:** Demonstrate knowledge of how success or failure depends not alone on technical proficiency but on quality of interpersonal relations as well.

TEST ITEM 105-00-11

See TEST ITEM 106-00-12

TEST ITEM 105-00-12

See TEST ITEM 110-00-13

**COMPETENCY 106**: Use success or failure constructively in a work situation.

TEST ITEM 106-00-11

INSTRUCTIONS TO STUDENTS: Select those items that indicate working cooperatively for success with fellow employees, supervisors, and management.

1. Jim is willing to help other employees.
2. Tom has a positive attitude toward his employer.
3. Bill loafs when the store manager is not in the department area.
4. Barry is consistently on time and generally completes all tasks.
5. Bob criticizes everyone.
6. Lane follows directions and store policies.
7. Johnny accepts criticism.
8. Phillip discusses confidential company expenses with his friends.

TEST ITEM 106-00-12

INSTRUCTIONS TO STUDENTS: Read each of the following statements about employee responsibility and determine if each statement is true or false. Write the correct response (True or False) in the blank to the left of the statement.

______ 1. A responsible employee is one who conceals their mistakes.

______ 2. If a customer, co-worker, or supervisor is in need of assistance, you should wait to be asked to help.

______ 3. When you fail to live up to your responsibilities you create a burden for someone else.

______ 4. Questions from new employees are resented by co-workers and supervisors and should therefore be avoided.

______ 5. Being responsible has to do with fulfilling your weaknesses.

______ 6. An irresponsible employee can have a very negative effect on company profits.

______ 7. If your job duties seem vague or unclear, you should hide your ignorance as long as possible.

TEST ITEM 106-00-13

INSTRUCTIONS TO STUDENTS: Read each of the following incomplete sentences. Determine which of the completion choices is most appropriate for each statement. Write the letter of this response in the space provided to the left.

_____ 1. When a supervisor offers suggestions concerning your employment, you should accept with a smile and then

A. act differently when that persons is around.
B. complain to your co-workers.
C. change your behavior in a positive manner.
D. ignore the advice.

_____ 2. The major difference between "destructive" and "constructive" criticism lies in the

A. way it was intended to sound.
B. validity of the criticism.
C. effect it has on your emotions.
D. way you put it to positive use.

_____ 3. When your supervisor criticizes your job performance, you should first

A. gain their sympathy.
B. take the criticism as being constructive.
C. write it off as being unfair.
D. explain that the supervisor probably doesn't really understand your job.

_____ 4. When criticism is not used in a constructive manner it becomes

A. useful for future reference.
B. valuable.
C. worthless.
D. defensive.

_____ 5. The personal characteristic that can be valuable in helping you to react favorably to criticism is

A. egotism.
B. impatience.
C. pessimism.
D. a sense of humor.

COMPETENCY 107: Work cooperatively with other employees, supervisors, and managers.

TEST ITEM 107-00-11

INSTRUCTIONS TO STUDENTS: Read each of the following statements about working cooperatively with others and determine if each statement is true or false. Write the correct response (True or False) in the blank to the left of the statement.

______ 1. People are said to be cooperative if they are resentful of each other.

______ 2. Frequently personality conflicts can harm the performance of a work group.

______ 3. By improving your self-understanding, you also improve your ability to understand other people.

______ 4. The difference between success and failure is very often a matter of attitude.

______ 5. When you have a positive approach to a working relationship, you can expect more conflicts with the work group.

______ 6. It is usually pleasant and inspiring to be around people with negative or pessimistic attitudes.

______ 7. You should consciously look for something good in everything and everyone.

______ 8. Developing a positive outlook often requires practice.

TEST ITEM 107-00-12

INSTRUCTIONS TO STUDENTS: Read each of the incomplete sentences. Determine which of the completion choices is most appropriate for each statement. Write the letter of this response in the space provided to the left.

_____ 1. A person with a positive attitude is said to be a(n)

A. defeatist.
B. optimist.
C. pessimist.
D. egotist.

_____ 2. Negative attitudes are

A. productive.
B. valuable.
C. assertive.
D. pessimistic.

_____ 3. If you feel unconcerned or disinterested toward someone or something you tend to be

A. assertive.
B. indifferent.
C. negative.
D. patient.

_____ 4. People with an adult outlook tend to believe in and respond to

A. equality.
B. pessimism.
C. superiority.
D. defensiveness.

_____ 5. The major reason for people leaving or losing their jobs is

A. their difficulty in getting along with others.
B. their dishonesty.
C. their job performance.
D. their poor self-concept.

TEST ITEM 107-00-13

INSTRUCTIONS TO STUDENTS: Place an X beside the statements below which reflect a positive attitude.

______ 1. "I like my job."

______ 2. "I can't stand my new supervisor."

______ 3. "If that new salesperson isn't fired soon, I'm going to quit."

______ 4. "I can succeed if I try."

______ 5. "My boss has got it in for me."

______ 6. "No matter how hard I try, I never seem to achieve success."

______ 7. "A positive attitude is important for a successful relationship."

______ 8. "That new student is a very likeable person."

TEST ITEM 107-00-14

INSTRUCTIONS TO STUDENTS: In the blank space provided below, identify at least two benefits of maintaining a positive attitude and two disadvantages of negative attitudes.

1. (positive) ________________________________________
2. (positive) ________________________________________
3. (negative) ________________________________________
4. (negative) ________________________________________

COMPETENCY 108: Demonstrate knowledge that the needs, desires, and goals of individuals vary with social and cultural backgrounds.

TEST ITEM 108-00-11

INSTRUCTIONS TO STUDENTS: Read each of the following statements about individual differences and determine if each statement is true or false. Write the correct response (True or False) in the blank to the left of the statement.

______ 1. The thing that people must have in order to lead full and happy lives are referred to as needs.

______ 2. The desire to be recognized for your personal accomplishments is an example of a need at the self-esteem level.

______ 3. Concerns for personal growth and achievement are found at the physical level.

______ 4. Once satisfied, needs tend to disappear.

_____ 5. The things we are involved with, concerned for, or curious about are referred to as values.

______ 6. Increased self-understanding should help you to better understand the behavior of others as well as yourself.

______ 7. Through mutual understanding, more cooperative and harmonious relationships are developed and maintained.

COMPETENCY 109: Avoid misrepresentations of products, services, people, and policies.

TEST ITEM 109-00-11

INSTRUCTIONS TO STUDENTS: Read each of the following statements about misrepresentations and determine if each statement is true or false. Write the correct response (True or False) in the blank to the left of the statement.

_____ 1. Often incorrect information is passed from one employee to another employee in the form of gossip or rumors.

_____ 2. Because messages can be all out of proportion when they travel through the "grapevine", care must be taken in delivering or receiving messages.

_____ 3. It is a bad practice to talk about your supervisor with other co-workers only if you are afraid they will tattle or slip and tell someone else.

_____ 4. Written information is considered to be more reliable than oral communications and should be used in stating business policies.

_____ 5. It is not necessary to verify information as long as you feel the information given you is probably true.

TEST ITEM 109-00-12

INSTRUCTIONS TO STUDENTS: Below are statements that should be considered either reliable or unreliable. The source of the information is given following the statement. Based on the statement and the source of the information, place an X beside the statements you should consider as reliable information.

_____ 1. Judy, another employee, told you that she heard the company was going to close their new branch store since profits were not what they had hoped they would be. (Co-worker)

_____ 2. A notice on the bulletin board said that there would be a meeting of all salespersons at 8:00 a.m. Friday morning. (Company)

_____ 3. "I heard Jack tell Susie that our lunch breaks had been extended an extra 15 minutes." (Co-worker)

_____ 4. "You'll look years younger after using Maximum Beauty Cream for just seven days." (Television commercial)

_____ 5. "All schools in the area will be closed today as the snowfall has been recorded at 3 inches." (Radio)

_____ 6. "I overheard Mr. Jake telling Mrs. Jones that you were going to be fired since sales were falling off in the store." (Co-worker)

_____ 7. Store policy states that anyone using sick days for any other purpose will be dismissed. (Company)

_____ 8. "Since your sales have increased over the past two months, your next pay check will have a 10 percent increase." (Supervisor)

TEST ITEM 109-00-13

See TEST ITEM 110-00-13

COMPETENCY 110: Respond to customer complaints in accordance with company policy.

TEST ITEM 110-00-11

INSTRUCTIONS TO STUDENTS: Respond to each of the customer statements based on the situation described below and the STORE POLICY provided.

SITUATION: You are the store manager trainee and today you are working at the service desk. The store manager is out to lunch and the assistant is off today. You are in charge of the store and must make decisions based upon store policy.

## STORE POLICY

1. Returned items must be accompanied by a sales slip and merchandise cannot be returned after ten days.
2. Extra help is always scheduled during ad days.
3. The service desk is the only location which issues rainchecks on ad items not in stock.
4. Items for which rainchecks are written are normally received within 10 days.
5. Quantities of ad merchandise ordered for a sale are determined for each store by the chain buyers and are based on past sales.
6. Sales run for a three-day period. The dates for the ad are printed under the ad in the paper.
7. Displays of items are not sold unless a line of merchandise is being discontinued.

## CUSTOMER STATEMENTS AND SITUATION

1. "The cashier won't refund my money on these shoes because I don't have my sales slip."
2. "I'd like to return these pants that I bought here two months ago. They have not been worn. Here is the sales slip!"
3. "I had to wait in line for a half-hour just to buy these cheap shoes and now you tell me you don't have my size."
4. "This coat was given to me as a gift and it doesn't fit."
5. "Can you guarantee this shirt will be fashionable next season."

## EST ITEM 110-00-12

INSTRUCTIONS TO STUDENTS: Read each of the following statements concerning customer complaints and store policies and determine if each statement is true or false. Write the correct response (True or False) in the blank to the left of the statement.

______ 1. Company policies are written just to make it difficult for employees to respond to customer complaints.

______ 2. If the customer complaining is your best friend it is alright for you to bend the rules just a little in order to keep their friendship.

______ 3. Company policies builds goodwill with competition for the business.

______ 4. If company policies are followed by every employee,fair and consistent treatment of customers is ensured.

______ 5. Employees should make up their own policies regarding customer complaints if there are no established company policies.

TEST ITEM 110-00-13

INSTRUCTIONS TO TEACHER: Students are to participate in a role-playing situation involving a given case study where he/she is a salesperson in an apparel department. They will be approached by a customer (the teacher, another student, or business-person, etc.) with a merchandise complaint and will react to the customer's problem in accordance with the store policies. Each situation should not last more than ten minutes. Use the rating sheet provided for evaluating student performance.

As you roleplay with the student, remember the following:

1. You are a very disturbed customer returning faulty merchandise.

2. You have had the following experience:

   You received a blazer as a gift last month. The label indicated that the blazer was washable. When the blazer was washed the lining shrunk and has pulled the blazer completely out-of-line. You are extremely upset because the store sold your friend faulty merchandise. You are bringing the blazer back for a cash refund. (Another appropriate item of merchandise may be substituted for the blazer.)

3. You demand that your money be returned. You will not accept credit because you never want any merchandise from the store again.

4. You would like to have your charge account closed unless the money is returned.

5. You are in a hurry to keep an appointment that you have in fifteen minutes.

6. You do not have your sales slip with you since the item was a gift.

7. Keep in mind that the salesperson does not know anything about your problem when you approach him/her.

8. Please be as realistic as possible. If the participant becomes confused and cannot handle the situation, we recommend that you accept credit and close the session.

TEST ITEM 110-00-13 (Continued)

INSTRUCTIONS TO STUDENTS: You are to study the Case Problem given to you. You are to act as the salesperson and will be approached by a customer who has a problem. You will be allowed ten (10) minutes to solve the customer's problem. You will be given (5) minutes to read the Case Problem. You will not know anything about the customer's problem until he/she enters the store area.

## CASE PROBLEM

You are a salesperson in an apparel department. The store carries a wide variety of merchandise. You have been working in this establishment for six months and have done very well in building management's confidence in your ability. Hoping to be considered for the assistant management position of a branch store in the mall that will be opening within the next year, you keep on your toes to show your abilities as a good salesperson.

The department manager has left you in charge of the department for two days while she is away on a buying trip. You will be approached by a customer who is upset about a problem with merchandise what was purchased in your department. You recognize the customer as a frequent visitor to the store and a well-known leader in the community.

Your human relations skills in assisting the customer with the problem will be evaluated.

## STORE POLICIES

No personal checks without two forms of identification.

Sale merchandise many not be returned.

All lay-aways must be paid out within 30 days.

No cash refunds without the customer's sales slip.

Returns without a sales slip will be allowed for exchange or credit only.

TEST ITEM 110-00-13

Student's Name ____________________ EVALUATION

INSTRUCTIONS: Encircle the number of points participant is awarded for each item on the evaluation and enter the amount in the "Total" column on the right. Indicate the overall total at the end. Use the following as guidelines for awarding points.

| | |
|---|---|
| Exceptional | on this item the participant reacted extremely professionally, the participant would rank as one of the top ten percent of persons employed as salespeople. |
| Above Average | on this item, the participant did a very good job and would rank in the top 20-30 percent of the persons employed as salespeople. |
| Average | on this item, the participant did okay and would be ranked as average; acceptable work. |
| Below Average | on this item, the participant was somewhat ineffective or ignored the situation; would call for additional training. |
| Unacceptable | on this item, the participant was totally ineffective; perhaps this person should not work as a salesperson. |

| Rate the participant on his/her skill in using the following human relations skills with the customer: | EXCEPTIONAL | ABOVE AVERAGE | AVERAGE | BELOW AVERAGE | UNACCEPTABLE | TOTAL |
|---|---|---|---|---|---|---|
| 1. TACTFULNESS - the ability to express ideas and opinions so they do not offend others.... | 7 | 6 5 | 4 3 | 2 1 | 0 | ____ |
| 2. COURTESY - well mannered conduct which shows consideration of others...................... | 8 | 7 6 | 5 4 | 3 2 1 | 0 | ____ |
| 3. OBJECTIVITY - appreciation of the other person and his/her opinions.................... | 8 | 7 6 | 5 4 | 3 2 1 | 0 | ____ |

| Rate the participant on his/her skill in using the following human relations skills with the customer: | EXCEPTIONAL | ABOVE AVERAGE | AVERAGE | BELOW AVERAGE | UNACCEPTABLE | TOTAL |
|---|---|---|---|---|---|---|
| 4. SELF-DISCIPLINE - the ability to control oneself........... | 9 | 8 7 6 | 5 4 | 3 2 1 | 0 | ____ |
| 5. CONCERN - the problem was important to the other person | 10 | 9 8 7 | 6 5 4 | 3 2 1 | 0 | ____ |
| 6. ACCEPTANCE - the ability to receive negative feelings from the customer............ | 6 | 5 4 | 3 2 | 1 | 0 | ____ |
| 7. EMPATHY - ability to put oneself in the other's position..................... | 7 | 6 5 | 4 3 | 2 1 | 0 | ____ |
| 8. ASSERTIVE - degree to which participant upheld the policies of the store........ | 11 | 10 9 8 | 7 6 5 4 | 3 2 1 | 0 | ____ |
| 9. CREDIBILITY - represented the business favorably to the customer................ | 11 | 10 9 8 | 7 6 5 4 | 3 2 1 | 0 | ____ |
| 10. INTERPERSONAL RELATIONS - degree to which the participant was able to avoid argument and win the customer's goodwill... | 11 | 10 9 8 | 7 6 5 4 | 3 2 1 | 0 | ____ |
| 11. INITIATIVE - degree to which the participant's skills provided a satisfactory solution for the customer's problem... | 12 | 11 10 9 | 8 7 6 5 | 4 3 2 1 | 0 | ____ |

TOTAL POSSIBLE POINTS: 100

TOTAL POINTS: ☐

**COMPETENCY 111:** Demonstrate knowledge of how to suggest changes to management.

TEST ITEM 111-00-11

INSTRUCTIONS TO STUDENTS: Read each of the incomplete sentences. Determine which of the completion choices is most appropriate for each statement. Write the letter of this response in the space provided to the left.

_____ 1. An "authoritarian" leader usually makes ______ major decisions independently.

A. all
B. no
C. few
D. many

_____ 2. Most misunderstandings between management and employees result from

A. "I don't care" attitudes.
B. communication breakdowns.
C. authority sharing.
D. management styles.

_____ 3. A leader is employed to __________________ the efforts of his/her subordinates.

A. criticize
B. guide
C. praise
D. record

_____ 4. The term "leadership style" refers to the __________________ with which a supervisor approaches the task of leading.

A. experience
B. knowledge
C. manner
D. time

_____ 5. If you like to feel you are a "member of the team", you will probably work best under a(n) ____________________ leader.

A. authoritarian
B. democratic
C. hands off
D. laissez-faire

## TEST ITEM 111-00-12

INSTRUCTIONS TO STUDENTS: For each situation listed below, indicate those changes which were suggested to management personnel correctly.

______ 1. A salesperson feels that more personnel are needed in the department to handle lunch-hour traffic. The salesperson tells the other salespeople.

______ 2. A salesperson has a new idea for preventing shoplifting and mentions it to the manager during the rush of closing the store for the day.

______ 3. A salesperson thinks of a new arrangement for the department and mentions it on a coffee break to the supervisor.

______ 4. The assistant manager has a new idea for inventory control and sends it to the manager in a memo.

______ 5. A salesperson wants to change the method of scheduling part-time employees and discusses it with the manager's secretary.

## TEST ITEM 111-00-13

INSTRUCTIONS TO STUDENTS: Identify the management "style" described in each of the following statements by circling the "A" for Authoritarian, "D" for Democratic, and "LF" for Laissez-Faire.

A D LF 1. Like to exercise only moderate control over the workers under their supervision.

A D LF 2. Prefers to exercise a high degree of control over their subordinates.

A D LF 3. Usually makes all significant decisions independently.

A D LF 4. Generally allows workers under their supervision to make their own plans and decisions.

A D LF 5. Encourages employee participation in planning and decision-making.

A D LF 6. Enjoys being "in command".

COMPETENCY 112: Accept constructive criticism and take appropriate corrective actions.

TEST ITEM 112-00-11

See TEST ITEM 106-00-13

# TEST ITEM KEYS

### 090-00-11

1, 5, 6, 7, 9

### 090-00-12

1. False
2. True
3. False
4. False
5. True

### 091-00-11

1. I
2. F
3. A
4. E
5. D
6. C
7. B
8. G.

### 092-00-11

1. B
2. D
3. C
4. D
5. C

### 093-00-11

1. A
2. A
3. C
4. D
5. A

### 094-00-11

1. 4
2. 5
3. 1
4. 3
5. 6
6. 2

### 095-00-11

1. False
2. True
3. True
4. True
5. True

### 095-00-12

1. C
2. B
3. B
4. C
5. C

### 095-00-13

1. 4
2. 2
3. 5
4. 3
5. 1

### 098-00-11

1. False
2. True
3. True
4. False
5. False

### 098-00-12

2, 3, 4, 7, 8

### 099-00-11

1. A
2. C
3. C
4. C
5. C

### 106-00-11

1, 2, 4, 6, 7

### 106-00-12

1. False
2. False
3. True
4. False
5. False
6. True
7. False

### 106-00-13

1. C
2. D
3. B
4. C
5. D

### 107-00-11

1. False
2. True
3. True
4. True
5. False
6. False
7. True
8. True

### 107-00-12

1. B
2. D
3. B
4. A
4. A

### 107-00-13

1, 4, 7, 8

### 107-00-14

Student answers to this question will vary. The following sample responses may be used as a guideline to evaluation.

| POSITIVE | Negative |
|---|---|
| 1. increased chances for success | 1. greater possibility (failure) |
| 2. improved self-concept | 2. poor relationships w/ others |
| 3. better job performance | 3. poor job performance |
| 4. more constructive behavior | 4. unproductive behavior |
| 5. better relationships w/ others | 5. poor self-image |

### 108-00-11

1. True
2. True
3. False
4. False
5. False
6. True
7. True

### 109-00-11

1. True
2. True
3. False
4. True
5. False

### 109-00-12

2, 5, 7, 8

## TEST ITEM KEYS

### 110-00-11

Student answers will vary somewhat, but the following will serve as suggestions in evaluation.

1. The students should explain that store policy requires sales slips for all refunds. The students should also suggest the customer look for the sales slip and show concern about why the customer is returning the shoes.

2. The student should explain that store policy requires all returns be made in ten days from date of sale and maintain an interest in the customer.

3. The student should explain that the store personnel try to work as quickly and efficiently as possible and apologize for the customer's wait. The student should also apologize for the fact that the shoes were such a fast selling item and for the fact that the right size is not in stock. Another item might be suggested for the customer.

4. The student should remain interested in the customer's problem and offer to make an exchange for the correct size.

5. There is no way the student can offer such a guarantee. Perhaps a reassurance could be offered to the customer as to the selection without offering any type of guarantee.

### 110-00-12

1. False
2. False
3. True
4. True
5. False

### 110-00-13

The student should reach a proficiency rating of 52.

### 111-00-11

1. A
2. B
3. B
4. C
5. B

### 111-00-12

None should be checked.

### 111-00-13

1. D
2. A
3. A
4. LF
5. D
6. A

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